

External Analysis of Forum Syd's Country Programs in Central America

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Department for Latin America

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Sida Evaluation 2008:11

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1. Executive Summary

1.1 Introduction

Forum Syd (FS) was established in 1995 by a merger between two major Swedish organizations representing civil society involvement with international solidarity and development issues as well as a tradition of sending young Swedish volunteers abroad. Up to year 2000, FS concentrated on activities predominantly located to Sweden, complying with the following principal roles:

- constitute a mechanism for internal CSO coordination and the articulation of discussions with Sida;
- support member organizations in their elaboration of project documents and applications for funding to be forwarded to Sida;
- support member organizations in the recruitment of volunteers to be sent to partner organizations in developing countries for a period of 1–2 years, and;
- undertake analytical work related to issues crucial for global development and coordinate advocacy activities around such themes.

Starting around 2000, this profile would soon change with FS's new role as a project or program implementing organization with a presence of its own in several developing countries. The launching of FS's own development program in Central America was facilitated by the introduction of a new financing modality introduced by Sida's Department for Latin America (RELA) in the Fall of 2003, through which Swedish CSOs could for the first time receive 100% funding for the implementation of their own projects and programs if considered to be in line with the Swedish development strategy for the countries involved.

Within this framework, RELA decided to support Forum Syd's application for a *Democracy and regional influence program* in Central America 2004–2006 with a total amount of about SEK 21 Million. In December 2006, however, RELA rejected a request from Forum Syd for a two-year continuation of a slightly adjusted version of this same program. In February 2007, on the basis of a new application, RELA decided to extend the support to Forum Syd with one year only, providing additional funds totalling approximately SEK 8 Million.

1.2 About the Present Analysis

1.2.1 Scope and objectives

The aim of this external analysis is to assess selected aspects related to the development programs established by Forum Syd in Central America (Nicaragua, Honduras and Guatemala). As defined by the ToR, the main task for this assignment is twofold:

- A. To analyse and assess developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007. This encompasses the identification of strengths, weaknesses and challenges in various areas.
- B. Within the context of the country concentration of Swedish bilateral development cooperation in Central America and the changing of RELA's support system to Swedish NGOs, provide a mapping and analysis of future scenarios regarding Forum Syd's programs in the region. The mapping and analysis should pay special attention to potential consequences for partner organisations and target groups, especially in terms of sustainability and results of processes in which they participate.¹

¹ Terms of Reference, page 4.

Key questions to be dealt with under theme (A) are the following:

- What level of coherence of and potential for synergies do the country *programmes* developed by Forum Syd display? Are the programs more than the sum of a number of projects, and if then, how?
- What is the value added of Forum Syd in the programmes? Apart from providing funding, which are the specific or unique qualities of Forum Syd in relation to its partner organisations?
- What is the current level of Forum Syd's institutional capacity (primarily organisation and vision)? One aspect seen as important to analyse would be the capacity and distribution of responsibilities and roles between the head office in Stockholm, the regional office for Central America, and the national offices. Another aspect to include is Forum Syd as a learning organisation, i.e. its making use of earlier experiences (globally and in Central America).²

Concerning the second theme (B), the following key questions are defined by the Terms of Reference:

- Embarking from an assumption of a phasing-out period of one year (2008), what are the most important challenges and possibilities for Forum Syd, its partner organisations and their target groups for each one of them? (...)
- How would a termination of RELA support affect Forum Syd's partner organisations and their target groups, especially in relation to the processes that they initiate and participate in (i.e. consequence analysis)? Differences (in a general sense) between and within country programmes should preferably be identified.³

Notwithstanding that the period to be directly analyzed and assessed consists of year 2007 only, the ToR also encourages a contextual approach:

- What are the most important lessons to be learned from the experience 2004–2007? Factors that should be taken into account are the preparatory phase (definition and construction of the programmes), Forum Syd's role as a Northern NGO vis-à-vis local counterparts, and Sida's (RELA and Embassies) capacity to secure a qualitative follow-up of the programme.⁴

Finally, the consultants are asked to include a chapter with recommendations to Forum Syd and also to Sida-RELA as regards the future.⁵

1.2.2 Team composition, main steps and constraints

The team consisted of two international consultants, Ms. Francesca Jessup (residing in Central America) and Mr. Pierre Frühling (residing in Sweden), with the latter as team leader. Preparations in Sweden and Central America were initiated during the second week of November, 2007. The joint field mission (Nicaragua-Honduras-Guatemala-Nicaragua) was carried out during December 3rd to 14th, 2007, terminating with a debriefing with representatives from Sida/the Embassy and Forum Syd's regional management. Finally, December 18th–December 19th, 2007, the last interviews were conducted in Stockholm with key staff at Forum Syd and other organizations.

Concerning difficulties and limitations, time for the preparation and carrying through of the assignment was limited, with virtually no margins for adjustments. Secondly, assessing a program which is composed of activities designed for facilitating processes when the program has been underway for only

² Terms of Reference, page 4.

³ ToR, page 5.

⁴ Ibidem, page 5.

⁵ For the full version of the Terms of Reference as well as the consultants' quote for this assignment (which was approved by Sida and contains certain delimitations of the territory to be covered), the reader should consult Annexes section.

a short time and with no Progress Reports covering the period in question (year 2007) yet available, obviously poses serious problems. Moreover, the timing of the field visits – which ended almost by mid-December – meant that it sometimes coincided with already planned vacations, thereby limiting the availability of persons to meet.

As a consequence of these limitations, the part of the assignment which is related to analyzing and assessing “developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007” had to be carried out in a different manner. Finally, concerning recommendations for the future, an obvious constraint was the fact that by the time the Mission had been completed, the phasing-out strategies (for Nicaragua and Honduras) and the new strategy process (for Guatemala) which according to the ToR should be used “as a point of reference” still constituted tasks pending.

1.3 Summary of Findings

- a) Within Forum Syd, the elaboration of its first own development program in Central America was undertaken in a rather improvised and non-institutional manner. This resulted in an underestimation of the challenges implied in making the transition from an organization skilled at recruiting volunteers to becoming the responsible implementer of complex development programs.
- b) Within Sida, the assessment of Forum Syd’s application was deficient, particularly when it came to analyzing the institutional capacities required for the new role to be shouldered by FS. Besides this lack of adequate quality in the assessment process, it was also performed in a remarkably slow manner, causing delays already from the very outset.
- c) As a result of these factors, the implementation phase was not firmly underway until the second half of year 2005, with only a little more than one year remaining for achieving established objectives. This reflected a considerable mismatch between the timeline and the very notion of implementing a program.
- d) Unfortunately, this incongruity became even more severe with the process related to Forum Syd’s application for a second phase of its Central American Program, which firstly was considerably delayed and, secondly, resulted in a one-year prolongation only. Even if it was emphasized that this one-year period was to be a transitional period, the mismatch between timeline, capacities and established objectives was continued.
- e) Analyzing the current (new) program documents, the consultants conclude that at the design level, FS’s activities reflect a number of features of a genuine program approach, rather than simply a collection of discrete projects. It comprises several interesting, incipient initiatives many of which could contribute over time to its significant programme goals. However, prospects for successfully and efficiently implementing such a program are still hampered by the gap between the ambitious dimensions of the program and the existing institutional set-up (the very limited technical back-up from, and linkages to, headquarters in Stockholm, and shortcomings in the installed capacity in the field) – as well as by the all-too short timeline.
- f) Human resources continue to constitute a critically weak link in Forum Syd’s set-up for the implementation of the programs and its efficiency in achieving established objectives. The situation is characterized by short contracts, a high rate of staff turnover and inadequate preparations of the staff in relation to tasks to be performed.
- g) This leads to a *lack of continuity*, in relation to the program as well as to organizational matters. A concomitant aspect is the limited capacity of Forum Syd (in Central America and related staff in Stockholm) to be a *learning organization*.

- h) Concerning *value added* by FS through its activities in Central America, it should be noted that the core functions and special skills of the organization in Sweden are only to a very limited degree reflected in the composition of the programs;
- i) Furthermore, the components which do reflect special skills represented by the organization (advocacy campaigns related to global development issues) have generally been weak, partly due to a lack of integration of the different programs but mainly as a result of the lack of response and support from headquarters.
- j) Thus, FS's programs in Central America do not capitalize on the organization's main identity and core competence, and there is no visible flow in the other direction either such that experience from common thematic activities in the field become new main action lines expressed in priorities and organizational adjustment at HQ and other levels of the organization.
- k) Even if Forum Syd no doubt did represent value added within some of the program components, it is not of a core character but rather of a temporary or relative kind. This implies that the programs are rather vulnerable (due to the limited reproduction within the organization of the specific skills required for ongoing activities) and it is also likely to be related to relatively low levels of efficiency.
- l) Regarding developments during the transition year 2007, there are positive tendencies in relation to the *shift from thematic to integrated country programs*, even if there still seems to be a need for clarification of the distribution of roles between the regional and individual country offices.
- m) Positive tendencies are also seen when it comes to *the geographical concentration*, though to a lesser degree thus far in Nicaragua.
- n) Concerning the intention to *work with grass-roots organizations (only) when it can have impact on the national level*, the picture appears to be mixed. While support is provided for several interesting local organizations and networks (with tangible results achieved at the community level), linkages to the national level are still scarce or undeveloped.
- o) Regarding *improved selection criteria for counterparts and the establishing of a system of monitoring and evaluation*, progress has been rather limited so far, particularly concerning the M&E system.
- p) The consequences of a termination of RELA's financial support by December 31, 2008 are likely to be quite negative. Such an approach would be incompatible with any kind of genuine *phasing-out* of ongoing activities and processes (permitting the consolidation of results, systematic searching for alternative funding and new allies, etc) and would in fact constitute a simple *shutting down* of the programs. It is also likely to imply serious difficulties for Forum Syd to maintain its core field staff, indispensable for undertaking any kind of gradual closing down of the programs, thereby engendering a series of administrative problems and loss of experience.
- q) *In Guatemala*, all or almost all of FS's current counterparts are likely to suffer considerable negative impact from a sudden termination of support from Forum Syd. As Swedish development cooperation for Guatemala will continue, a sudden "shutting down" of current activities within the FS Guatemala Program could also provoke some politically negative consequences.
- r) *In Honduras*, the nationally-based NGOs and CSO consortia would probably have few difficulties in overcoming the financial part of a sudden termination of the support. However, for the majority of FS counterparts – which are locally-based – a rapid termination would imply a serious loss of resources and organizational support. Regarding the political dimension, a sudden termination of the Swedish support for a program implemented by CSOs would contrast negatively with the longer period announced for the phasing-out of the bilateral activities.

- s) *In Nicaragua*, finally, many of Forum Syd's counterparts would probably find other sources for financing and other kinds of support needed to consolidate ongoing activities. However, considering that the current political situation in the country is characterized by serious regressions for the respect of basic human rights (particularly women's rights) and for the functioning of democratic governance, the coming period will be a strategic one for civil society and their organizations. In this context, a *shutting down* of a CSO operated program deeply involved in these themes is likely to have negative political consequences. The fact that the Swedish Governmental development cooperation program with Nicaragua will enjoy a considerable period for its phasing-out, may in this context aggravate the political consequences of a rapid withdrawal of the support for civil society.

1.4 Recommendations

1.4.1 Concerning Forum Syd

- a) That Forum Syd analyze and define their *value added* and *comparative advantage* with respect to having country programs in Central America. This analysis should include a systematic exploration of how their identity and historical experience in Sweden could be better utilized and related to future core activities in the Central American Region.
- b) In this context, a detached analysis based on concrete knowledge of Central America should also be done concerning the kind of qualifications for human resources required for the undertakings and roles defined above, without letting current funding mechanisms and conditions stemming from these limit the character of the analysis.
- c) That Forum Syd develop and apply a policy for taking decisive steps towards becoming a *learning organization*. This includes mechanisms for the systematizing of experiences; developing better linkages and exchange between HQ and the field, with enhanced capacities at HQ for technical support and coordination; methods for taking stock of staff experience; systems for rotation of staff and broader career opportunities for locally employed personnel.
- d) That Forum Syd Headquarters as a matter of urgent priority undertake a rigorous revision of their current *de facto* human resources policy, with attention not only to recruitment, but to training, staff descriptions, salaries and all other pertinent aspects of staffing. An Action Plan should be elaborated and implemented.
- e) That Forum Syd assign highest priority to insure the development of the much-referred-to systems for monitoring and evaluation, making them operational without further delay and giving all support needed to the offices for its practical application.
- f) That Forum Syd's program teams in Central America identify their strategic and technical back-stopping needs, generating an Action Plan within HQ on how to swiftly and sustainably satisfy these needs.
- g) That Forum Syd strengthen political dialogue, coordination and knowledge-sharing with other Swedish NGOs (which generally also are member organizations within FS) present in Central America.
- h) That Forum Syd – in case the Central America program will be soon phased out – develop a plan in order to grant counterparts the time period needed to consolidate ongoing activities, assisting them in the search for alternative funding and new allies.
- i) That Forum Syd – in order to diminish outside financial dependency and to insure reasonable periods of phasing-out, should that become a task to be performed – without delay proceed according to the 2007 General Assembly decision concerning the initiation of fund-raising for own activities.

1.4.2 Concerning Sida-RELA

- a) That decisive measures are taken to improve procedures for the review and assessment of applications from Swedish NGOs, insuring both an appropriate quality of the analysis and a reasonable time frame.
- b) That the division of responsibilities between RELA and the Embassies concerning the follow-up of programs implemented with RELA-funding is clarified and the tasks to be undertaken more precisely defined.
- c) That a decision promptly is taken which ends the current situation with almost total uncertainty for Forum Syd, its staff and counterparts concerning continued funding for their ongoing Central America Program.
- d) That in case the decision will imply the termination of RELA-support, the final time period and funding granted will be sufficient to permit Forum Syd to carry out a technically appropriate and ethically acceptable phasing-out period, supporting counterparts to consolidate initiated processes, seek alternative funding and new allies.
- e) That in case a decision on the termination of RELA support is taken, key criteria for defining the magnitude and length of the phasing-out process of activities in Central America should include *(i)* the different character of the organizations supported in each country, and; *(ii)* the importance and role of civil society in the current political short to medium-term situation in each country, related to core development issues such as respect for human rights and democratic governance.

2. Introduction

2.1 The General Context

Forum Syd was established in 1995 by a merger between two major Swedish organizations representing civil society involvement with international solidarity and development issues as well as a tradition of sending young Swedish volunteers abroad. Today, *Forum Syd* constitutes a politically and religiously independent umbrella organization or platform, comprising some two hundred Swedish organization working with international development assistance and opinion formation on selected global issues. Member organisations range from major popular movements with sizeable staff to small societies run entirely on a voluntary basis. Forum Syd (FS) also works with a large number of organisations and networks worldwide; the common aim being global justice.

Before 2000, FS concentrated on what was seen as its inherited traditional and principal roles:

- constitute a mechanism for internal CSO coordination and the articulation of discussions with Sida on rules and conditions for support to activities undertaken by Forum Syd's members organizations in developing countries;
- support (generally the smaller) member organizations in their elaboration of project documents and applications for funding, which then were forwarded to Sida;
- support member organizations in the recruitment of volunteers to be sent to partner organizations in developing countries for a period of 1–2 years, and:

- undertake analytical work related to issues crucial for global development and coordinate advocacy activities around such themes.⁶

In short, this meant that Forum Syd's own activities were predominantly located to Sweden, where it represented a well-known organization within international and development circles. However, this profile would soon change with FS's new role as a project or program implementing organization with a presence of its own in several developing countries, also in Latin America.

This change in work modalities was not unique to FS but rather constituted a trend among Swedish and Nordic NGOs, partly related to a renewed discussion within the international development community during that period in time on the pros and cons of traditional "volunteers" vs. "development workers".

Moreover, in the specific case of FS, the launching of its own development program in Central America was also influenced by the fact that Sida's Department for Latin America (RELA) had announced the start of a new financing modality, for which applications could be presented starting in the Fall of 2003. Through this new modality, Swedish CSOs could for the first time receive 100% funding for the implementation of their own projects and programs if considered to be in line with the Swedish development strategy for the countries involved. This provided a major new financing opportunity for Forum Syd, which, due to its umbrella character had never undertaken fund-raising campaigns for their own activities.⁷

2.2 The Scope of the External Analysis

The aim of the external analysis is to assess selected aspects related to the development programs mentioned above and established by Forum Syd in Central America (Nicaragua, Honduras and Guatemala). As defined by the ToR, the main task for this assignment is twofold:

- C. To analyse and assess developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007. This encompasses the identification of strengths, weaknesses and challenges in various areas. The analysis should be carried out by consistently referring to the ability to attain concrete results for poor women and men in Honduras, Nicaragua and Guatemala in an effective way.
- D. Within the context of the country concentration of Swedish bilateral development cooperation in Central America and the changing of RELA's support system to Swedish NGOs, provide a mapping and analysis of future scenarios regarding Forum Syd's programs in the region. The mapping and analysis should pay special attention to potential consequences for partner organisations and target groups, especially in terms of sustainability and results of processes in which they participate.⁸

Key questions to be dealt with under theme (A) are the following:

- What level of coherence of and potential for synergies do the country *programmes* developed by Forum Syd display? Are the programs more than the sum of a number of projects, and if then, how?
- What is the value added of Forum Syd in the programmes? Apart from providing funding, which are the specific or unique qualities of Forum Syd in relation to its partner organisations and other

⁶ This line of activity was not so much of a heritage but rather something substantially improved with the establishment of Forum Syd.

⁷ Many of its member organizations however have a long and successful fund-raising tradition, thereby long since having had access to other Sida modalities for NGO funding. (Where always an own financial contribution was required, initially at least constituting 20% of the total project costs, later to be reduced to 10%).

⁸ Terms of Reference, page 4.

international NGOs (such as thematic expertise, lobbying, financial systems, planning processes, methodology).

- What is the current level of Forum Syd's institutional capacity (primarily organisation and vision)? One aspect seen as important to analyse would be the capacity and distribution of responsibilities and roles between the head office in Stockholm, the regional office for Central America, and the national offices. Another aspect to include is Forum Syd as a learning organisation, i.e. its making use of earlier experiences (globally and in Central America).⁹

While historical factors obviously will be dealt with when needed in order to facilitate the analysis, the period to be directly addressed under this heading (A) is defined as developments during year 2007 only and/or the current situation.

Concerning the second theme (B), the following key questions are defined by the Terms of Reference:

- Embarking from an assumption of a phasing-out period of one year (2008), what are the most important challenges and possibilities for Forum Syd, its partner organisations and their target groups for each one of them? (...)
- How would a termination of RELA support affect Forum Syd's partner organisations and their target groups, especially in relation to the processes that they initiate and participate in (i.e. consequence analysis)? Differences (in a general sense) between and within country programmes should preferably be identified.¹⁰

Notwithstanding that the period to be directly analyzed and assessed consists of year 2007 only, the ToR also encourages a contextual approach:

- What are the most important lessons to be learned from the experience 2004–2007? Factors that should be taken into account are the preparatory phase (definition and construction of the programmes), Forum Syd's role as a Northern NGO vis-à-vis local counterparts, and Sida's (RELA and Embassies) capacity to secure a qualitative follow-up of the programme.¹¹

Finally, the consultants are asked to include a chapter with recommendations to Forum Syd and also to Sida-RELA as regards the future.¹²

2.3 The Assignment: Its Evolution and Constraints

2.3.1 Team composition, methodology and main steps

The team consisted of two international consultants, Ms. Francesca Jessup (residing in Central America) and Mr. Pierre Frühling (residing in Sweden), with the latter as team leader.

Preparations in Sweden and Central America were initiated immediately after the signing of the contract with Sida-RELA (November 8th, 2007). During this initial phase, considerable effort was dedicated to achieve a reasonable reconstruction of the circumstances and context in which the first Central America Program was elaborated by FS and approved by Sida.

The joint field mission (Nicaragua-Honduras-Guatemala-Nicaragua) was carried out during the fortnight of December 3rd–14th, 2007, terminating with a debriefing at the Swedish Embassy in Managua with representatives from Sida/the Embassy and Forum Syd's regional management.

⁹ Terms of Reference, page 4.

¹⁰ ToR, page 5.

¹¹ Ibidem, page 5.

¹² For the full version of the Terms of Reference as well as the consultants' quote for this assignment (which was approved by Sida and contains certain delimitations of the territory to be covered), the reader should consult Annexes section.

Finally, from December 18th–December 19th, 2007, the last interviews were conducted in Stockholm with key staff at Forum Syd and other organizations.

Concerning sources, the Report draws on extensive reading of documents, interviews with a wide spectrum of persons in Sweden and in Central America and field visits. Regarding methodological aspects related to these sources, the following are worth mentioning:

- *documents*: the analysis includes official as well as other categories of documents, such as the personal final report often produced by FS staff;
- *persons interviewed*: apart from current and former FS and Sida staff, the list also includes relevant persons with current or former positions within member organizations, as well as persons not belonging to this kind of “extended family”, representing relevant experience. All representatives from current or former partner organizations to FS (in Central America) were interviewed without the presence of staff from Forum Syd.
- *field visits*: in each and every country, the mission met with a substantial number of FS’ partner organizations, and at least some were visited in their own area of action (village, rural zone, etc). The meetings were convoked by FS but the visits were undertaken by the consultants only, travelling in a private car.¹³

2.3.2 Difficulties and constraints

Under this heading, *the time constraint*, in various dimensions, should be emphasized. Firstly, time for the preparation and carrying through of the assignment was limited, with virtually no margins for adjustments of any kind. Secondly, to assess a program which is composed by activities designed for facilitating processes (with results hopefully accruing from these processes) when the program has been underway for only a short period and with no Progress Reports covering the period in question (year 2007) as yet being available,¹⁴ obviously poses serious problems. Moreover, the timing of the field visits – which ended almost by mid-December – meant that it sometimes coincided with already planned vacations, thereby limiting the availability of persons to meet.

As a consequence of these limitations, the part of the assignment which is related to analyzing and assessing “developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007” had to be carried out in a different manner. In the absence of concrete and confirmed data for the very short period in question (and the lack of time and opportunities to compile this information through interviews), the consultants have chosen a more indirect and qualitative approach.

Finally, concerning recommendations for the future, an obvious constraint was the fact that by the time the Mission had been completed, the phasing-out strategies (for Nicaragua and Honduras) and the strategy process (for Guatemala) which according to the ToR should be used “as a point of reference” still constituted tasks pending.

In this context we would also like to express our gratitude to all persons involved who – in spite of sometimes difficult circumstances – took the time to meet with us, explain their activities, discuss different matters and answer our long series of questions.

¹³ Details concerning written sources, persons interviewed and organizations visited can be found in the Annexes section.

¹⁴ Which is entirely in congruence with the Agreement between Sida and Forum Syd on the Program, which establishes that reports for 2007 are to be delivered by May 31, 2008.

3. The Present as History or the Burden of a Bad Start

3.1 Introduction

When Forum Syd submitted an application to Sida in October 2003 for the establishment and implementation of a program of their own in Central America (Nicaragua, Guatemala and Honduras), it represented an attempt to implement a major shift in the organization's way of working. Furthermore, it was both a large (SEK 21 Million for the three year period 2004–2006) and complex endeavour, comprising broad thematic programs, planned to combine and link the local with the national as well as the national with the Central American level.

Indeed, Forum Syd could point to some previous experience from program activities, having managed the Gender Equality Program in Nicaragua since year 2000 and having been directly involved with the UN Volunteer Program in Guatemala.¹⁵ Furthermore, the application stressed the close coordination or partnership with some of Forum Syd's member organizations who were to actively support and become involved in the programs. These positive factors were repeatedly underscored by FS in their application as well as by Sida's different branches in the assessment process of the application.

However, if examined closely, these "supporting factors" were more of a nominal than real character. In fact, the Gender Program in Nicaragua was not designed or formulated by Forum Syd but rather entrusted to them for a managerial role by Sida as a prolongation of earlier Swedish support within this field.¹⁶ While the UN Volunteer Program no doubt had generated valuable knowledge concerning certain dimensions and sectors of the Guatemalan society, its structure and contents clearly fall short of constituting a real program approach.

Concerning coordination with and involvement from certain member organizations within Forum Syd for the implementation of the program presented, the degree of direct commitments towards the creation of a joint institutional and long-term undertaking was very modest, indeed. Moreover, the organizations mentioned in the application generally represented the same limited level of experience in program design and implementation as Forum Syd.

In fact, the shortcomings mentioned above reflect the way in which the program document was elaborated by Forum Syd and the manner in which it was assessed later by the responsible authority, Sida. Apart from merely procedural aspects, both these processes were characterized by major deficiencies which would severely affect coming developments, i.e., the setup and implementation of the new Forum Syd program in Central America. Somewhat similar tendencies were to continue when it came to managing the prolongation (which constitutes the period for analysis under this assignment), and these processes (within Forum Syd and Sida, respectively) merit examination in a slightly more detailed manner.

This kind of historical reconstruction will hopefully also shed light on lessons to be learnt and the institutional aspects to be addressed as established by the ToR, mainly concerning Forum Syd but also related to Sida.

¹⁵ Experiences of facilitating and implementing program-type activities had also recently been carried out in Cambodia, another developing country where Forum Syd was present.

¹⁶ According to a recent evaluation, this assertion would largely be valid not only for the first period (2000–2003) but also for the second one (2003–2006). [Wennerholm and Real, 2006, pages 4–6.]

3.2 Prevailing Ideas and Other Circumstantial Factors

Before dealing directly with the internal processes at Sida and Forum Syd, some general and circumstantial factors from the period under analysis should be explicitly mentioned – not necessarily as an attempt to recreate the so-called “*Zeitgeist*” but at least to recall some prevailing ideas, perceptions and other factors which no doubt were influential when it came to decision making concerning development cooperation and Swedish NGOs.

Firstly, it should be stressed that the period from the end of the 1990s to the very first years of the 21st century were characterized by a distinct re-evaluation of the merits of an old tradition in this context: the sending of volunteers (recruited by Swedish CSOs) to serve for a year or two in developing countries. While this mechanism originally had been seen mainly as an expression of solidarity and as a tool for creating better understanding in Sweden regarding conditions in developing countries, it was now increasingly being analyzed rather in terms of its effectiveness for obtaining results in the developing country.

Analyzing volunteers with the criteria from development assistance, the system seemed clearly outdated. Some studies and evaluations undertaken during this period seemed to put the last nail in the coffin of the “volunteer institution” – affecting strategic thinking within Swedish NGOs as well as within the unit at Sida responsible for financial contributions to their international involvement (including the recruitment of volunteers). Instead of recruiting volunteers (mainly) on the basis of their excellent personal merits, this new perspective argued for seeking young professionals for specific projects and other concrete activities.

Secondly, within the universe of project analysis, the prevailing new wisdom was that projects generally were a relatively costly and inefficient way of undertaking development assistance; instead programs composed of logically linked components (or dimensions) should be designed, allowing for lower costs and more impact.

Thirdly, during more or less this same period, Sida’s Department for Latin America (RELA) was receiving increasing criticism for a special arrangement which facilitated the implementation of long-term and very sizeable development programs in Latin America which was said to create a situation where in principle only one (or maybe two) Swedish NGOs could be eligible.¹⁷ This was not only against normal procedures within Swedish public administration but could also be harmful for the competitiveness of the CSO in question. The solution to this situation was to create the special mechanism mentioned earlier, which allowed for the financing of 100 per cent of the costs for development activities undertaken by Swedish CSOs. It was precisely this mechanism, established in 2003, which made it possible for Forum Syd to submit their program for Central America to Sida.¹⁸

3.3 Forum Syd’s First Central America Program Comes into Being

What follows is an effort to reconstruct the chain of events which led to the formulation of Forum Syd’s Central America Program and its presentation to Sida. The description is largely based on interviews with persons who were key actors during the period 2001–2005. The intention is not to burden the reader with chronological details but to correctly reflect the principal characteristics which strongly conditioned future developments. Notwithstanding the fact that the process was highly dependent on very few individuals, our intention has been to de-personalize the description.

¹⁷ The principal one being the ecumenical organization Diakonia, which by then already had a long tradition of implementing programs.

¹⁸ The establishment of this new modality was probably also facilitated by the fact that – at that period in time – financial resources for increasing this kind of support for Latin America were readily available to Sida.

When the new Director for Forum Syd in Central America took up his post in Managua in the Fall of 2001, in addition to his task of managing current activities he also bore a special assignment from the organization's Secretary General which could be summarized as: *"Either you prepare for a phasing-out of our current volunteer-based activities as a prelude to closing down operations or you propose and formulate something new and, more development-oriented."* This task or instruction (which has been acknowledged or referred to by all key actors interviewed for this study) seems to have been given orally only and was not reflected in any formal document. For the new Director the choice was clear: Forum Syd should start a strategic regional development program and move beyond the traditional volunteer modality.

However, to manage Forum Syd's current activities and simultaneously undertake the design of a new line of activities in several countries of the Region proved to be too onerous for one person, explaining why soon a special recruitment was undertaken in order to create a small "task force" which finally came to consist of three persons. During the following year and a half, intense activities were carried out by this small but very energetic working group, aimed at developing a program framework which should be not only strategically and conceptually interesting but also related to the identification of (existing or new) partner organizations with the capacity of achieving the objectives.

The general thrust was towards democracy strengthening from below, within a rights perspective and linking concrete local, grassroots activities with national and regional activities. An important component would be the establishment of a training centre for advocacies related to democracy and the claiming of citizen's rights.

Coordination with and support from important member organizations within Forum Syd who already had activities in Central America (some eight organizations) was emphasized as a cornerstone but real progress concerning this dimension seems to have been meagre¹⁹ and interest from organizations with solid experience from running projects and programs of their own (such as Diakonia and Swedish Cooperative Centre) was low.²⁰

However, parallel to these intense planning activities in Central America, very little seems to have been undertaken at FS in Stockholm to broadly discuss the different draft proposals or to identify and prepare for the new requirements a regional program would imply for the organization as such.²¹ Seen in retrospect it appears obvious that the elaboration of a new line of activities for FS in Central America lacked the kind of support at HQ and at other levels within the organization (including its Board) that a new undertaking of this magnitude generally needs in order to become institutional and (hopefully) successful.

With only a few months left for Sida's deadline for the submission of applications under the new financing modality, the FS task force in Central America realized that the situation was dramatic. Not only had there still been no discussion on the new proposal within Forum Syd's own Board of Directors,²² but it also became obvious that the new initiative was little known within the organization and that it even lacked support from the desk officer at HQ responsible for Latin America.

¹⁹ Soon after the program was started, this was reconfirmed when relations showed to be either very thin (Guatemala) or were openly strained and finally cut off (Honduras) between FS and the member organizations initially presented as partners.

²⁰ On Diakonia's side, this may have been due to a certain degree of self-interest, to differences concerning FS's conceptual framework (partly related to discussions on the "legitimacy" or "genuineness" of different categories of Central American NGOs/CSOs and which thus should be given priority as partners), to skepticism regarding FS's real capacities for undertaking the proposed program, or simply to the fact that Diakonia already had their tasks well-defined and agendas filled. Whatever the combination of reasons may have been, it meant the loss of valuable experience-based contributions and most likely also reflected a lack of coordination at HQ level in Stockholm (which otherwise would have resulted in giving this "adventure" a shared and high priority).

²¹ Such as staffing in Central America (affecting volunteer recruitments), administrative (including accountancy and financial control) and management capacities needed, mechanisms for monitoring and follow-up, etc.

²² Soon after preparations for the new program got started in Central America, the Secretary General who seems to have started this initiative left FS for another institution and during several months his post was left vacant.

In response to this situation, the Director of FS in Central America sent his letter of resignation to HQ. Within a week or two, the desk officer for Central America at the Stockholm office went on leave for health problems. Immediately thereafter, the Director in Central America was contacted by the interim desk officer who requested that he should oversee the last and very urgent phase of the elaboration of the full application for the Central America Program. With the firm support from the special resource persons in Central America, the task was terminated in a question of weeks only, under very hectic circumstances. It was soon also approved by the Board and finally submitted, in time, to Sida in October 2003.

However, before Sida's assessment procedure had been finished towards mid-2004, all (of the few) key persons within Forum Syd who had been responsible for initiating and designing the new Central America Program had left the organization. Furthermore, recruitment for the new program implementation team needed had still not been undertaken. Thus, FS personnel present in Central America still consisted of traditionally recruited volunteers, each working within a specific organization.

3.4 Some Features of the Assessment Procedure within Sida

Concerning the processing of received applications from Swedish NGOs for the new 100 per cent financing modality established by Sida-RELA in 2003, the institutional responsibility was distributed as follows:

- i. coordination of the process, final considerations and overall responsibility for the decision was to rest with RELA;
- ii. SEKA, the division at Sida responsible for the general support to Swedish NGOs for international activities (including funding of volunteers), was to provide an input for the assessment of the organization as such;
- iii. the Swedish Embassies or Embassy section offices in Central America were to contribute with comments on the contextual relevance and realism of the country (and region-) specific aspects of the program as well as the direct experience hitherto (if any) related to the organization behind the application.

At first glance, this may seem to constitute a reasonable procedure, providing different kinds of input for the final decision by RELA. However, in cases such as the one represented by Forum Syd, this approach had a serious and fundamental flaw when it came to the assessment of the institutional capacities of the organization.

Whereas SEKA may well have had extensive experience concerning most organizations presenting applications, the existing experience or knowledge was not automatically the most relevant one. Regarding Forum Syd, for instance, its previous experience had very little to do with the organization's strength and capacities for new project or program implementation, but was rather based on FS's fulfilling previous roles and functions.²³ Simply put, as FS hitherto had not been known as a program implementing organization, the basis for an assessment of its program-related capacities was not to be found within Sida.

Considering the dimensions of the financial resources being requested (over SEK 20 Million), the standard procedure in a similar context (such as with a relatively little-known national Health or Environment Ministry, for instance) would most likely have involved a decision to undertake an institutional assessment focusing on the capacities considered critical for insuring good results. In this case,

²³ Mainly constituting a mechanism for the articulation of discussions with Sida on rules and conditions for support to activities undertaken by Forum Syd's member organizations in developing countries; supporting smaller member organizations in their elaboration of project documents and supporting member organizations in the recruitment of volunteers.

however, no such decision was taken – to a large extent because none of the different actors involved from Sida fully grasped that this application in fact was not “business as usual” plus something new, but rather constituted an attempt to implement a dramatic change in Forum Syd’s work modality which had profound implications.

A contributing factor may have been the rather considerable staff turnover and staff changes within RELA during this same period, which meant that several persons during different periods had the responsibility for processing the application from Forum Syd and preparing the background paper for a decision. Other reasons may have been (a) that the assessment process became delayed (mainly due to secondary factors such as staff changes etc), thus contributing to time pressure, (b) that the prevailing climate at Sida seemed to be in favour of new organizations entering the stage as implementers of development programs and, (c) that the application was ambitious and presented certain interesting and persuasive concepts and ideas, giving the impression that Forum Syd was fully aware of the requirements for launching such a program.

Regardless of the reasons, the end result of the procedure within Sida was that Forum Syd’s application was never subjected to a review or assessment of appropriately rigorous character and standards. In addition – in spite of very few substantive comments which would have required major adjustments of the document – the process was considerably delayed, with the decision (approval) being taken not until June, 2004.²⁴

3.5 The Application for a Second Phase of Forum Syd’s Program

As evidenced above, Forum Syd’s first Central America Program came into being in a remarkably non-institutional manner and became orphan virtually before getting started. Moreover, there was substantial delay in the decision from Sida as well concerning the organization’s own recruitment of appropriate staff. Largely due to these factors, the start of the program – which according to the documents should have occurred in January, 2004 – was considerably delayed. Practically speaking, the implementation phase was not firmly underway until the second half of year 2005, with only a little more than one year remaining of the original period granted for achieving established objectives.

The consequence of seriously underestimating (by FS as well as Sida) the magnitude of the new task contained in the application from Forum Syd meant a considerable mismatch between the timeline and the very notion of implementing a program; between the time available and the processes to be facilitated and supported in order to generate results. Unfortunately, this incongruity became even more severe with the process related to Forum Syd’s application for a second phase of its Central American Program.

During 2006, Forum Syd first elaborated a strategy for Central America, covering a period of four years (2007–2010). The Regional Office of FS in Central America then turned this strategy into a 3-year program document which was sent to its headquarters in Stockholm. After sustaining informal discussions with Sida-RELA, Forum Syd’s HQ condensed the three-year document into covering two years only (2007 and 2008). This application was then officially submitted to Sida, where in December 2006 it was rejected, due to the following concerns related to the ongoing Program:

- unacceptable weaknesses in narrative and financial reports received hitherto;²⁵
- an unclear division of roles and competences within FS concerning the program, affecting efficiency levels, and;

²⁴ Implying a period of 9 months, counting from the presentation of the application in October, 2003.

²⁵ “...which in turn may lead to questions about their [FS’s] capacity to assist Central American CSOs in their organisational development....” [RELA, *Initial Assessment of application from Forum Syd 2007–2008*]

- very low levels of disbursements in relation to the approved program budget.

After another round of consultations between the parties, Forum Syd's office in Stockholm submitted a new application covering year 2007 only, which subsequently was approved by Sida towards the end of February 2007.²⁶ Even if Sida's approval decision as well as the contents of the new application emphasized that this one-year period was to be a transitional period, the mismatch between timeline, capacities and established objectives was continued.

3.6 Sida and the Implementation Phase

In this context it should finally be noted that Sida's role concerning the implementation phases of the program also reflects institutional shortcomings. According to the internal division of responsibilities, the Embassies in Managua and Guatemala (and the Embassy section office in Tegucigalpa) have a certain task to fulfill in the follow-up of the FS's programs which are financed under the 100 per cent funding RELA modality. However, judging from interviews with staff both at RELA and the Embassies, the extent and depth of this responsibility is not sufficiently well-defined, a situation reinforced and/or complicated by two factors: firstly, that the workload of Embassy staff is very substantial and, secondly, the fact that financial responsibility (and thus the last word) for the program rests with RELA.

4. Assessing Recent Developments and FS's Capacities

4.1 Introduction

One of the two main objectives referred to in the ToRs for this study are to "analyse and assess developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007." Given the chronological and institutional complexities of this process, it is important to clarify how this study understands this process of change. For the purposes of this consultancy, the changes being examined are those outlined in Forum Syd's *Additional Application for 2007*, a two-page general document which outlines broad changes to be implemented in the Central America program. This document is complemented by brief country-specific additional applications for 2007 for Nicaragua, Guatemala and Honduras.²⁷ These latter documents (each one consisting of approximately seven pages) spell out in broad terms the general focus in each country program.

The two-page *Additional Application for 2007* noted above (which refers to the complete Central American Program), asserts that the application should be seen as a "prolongation of the current programs with the difference that the new application has integrated the different program themes into one country program per country." It is important to understand that the phrase "prolongation" in this context refers only to the financial mechanism being employed, not to a continuation of objectives and strategies of the program 2004–2006. Both the *Additional Applications* and the *Annual Operative Country Program Plans (POAs)* for 2007 were developed with direct reference to the context, strategy, and methodologies as developed in the original program documents submitted in Forum Syd's application for 2007–2008.²⁸ This is a key issue in understanding the very challenging dimensions of the changes to be implemented in the "transition year".

²⁶ This second or "new" application in reality consisted only of a short amendment to the application rejected in December 2006. (See further next chapter of the present report.)

²⁷ *Solicitud Adicional para el 2007, Nicaragua; Solicitud Adicional para el 2007, Honduras; Solicitud Adicional para el 2007, Guatemala*

²⁸ Documents which, furthermore, originally had been elaborated to cover a three-year period. (See further section 3.5.)

Although each country program's *Additional Application* is somewhat different with respect to specific results and indicators to be achieved during 2007, the broad thrust of the changes to be achieved during the transition period were expressed in condensed form in the two-page FS' *Additional Application* for the region. The latter document outlines the following changes:

- Shift from thematic programs to integrated country programs
- Greater concentration of efforts in one geographical region per country
- Work with grass-roots organizations where links can be established with national level changes
- Improved parameters and selection criteria for long-term counterparts and allies
- Establishing of systems of monitoring and evaluation to insure better measurement in goals, indicators and expected results.

Additional changes contemplated included a review process for human resources, in order to make the most effective use of those recruited in Sweden. The document added that the "*Swedish presence would be diminished in favour of more human resources from the region.*"

In order to understand the "transition year" to be assessed in each country, it is important first to review the principal objectives and strategies of the proposed country programs for 2007–2009, as the transition is located in the context of these future goals.

4.2 Country Programs 2007–2008

Each individual country program derives from Forum Syd's *Strategic Plan for the Central American Region 2007–2016*, which was the result of a process carried out from March through July 2006 in Guatemala, Honduras and Nicaragua. Forum Syd staff in the region participated in the strategic planning process, as did functionaries from FS' headquarters in Stockholm. In an effort to enhance ownership, appropriation, and transparency, Forum Syd invited counterparts, strategic national actors, NGOs and civil society representatives to contribute to the process, as well as members of Swedish NGOs with whom Forum Syd had worked. Individual country programs were then developed in order to achieve these proposed objectives and results of the regional strategy.

The development objective at the regional level is to *contribute to participatory democracy and development in Central America from a perspective of rights, equity and sustainability*. Its specific objectives are:

- 1) strengthen the capacities and competencies of civil society;
- 2) strengthen the exercise of citizenship; and
- 3) strengthen the positioning of civil society on global development issues.

These same objectives, general and specific, appear in each of the country program documents. The country program documents all contain in their introduction the same model design which illustrates the relationship between development objective, specific objectives and results. Each country program document then provides the specific characteristics of each country, and how the program will tailor its focus and activities to respond to the realities of the principal actors and counterparts.

4.3 Additional Applications by Country

The short *Additional Applications* for each country are identical in structure. They express a commitment to the harmonization goals of the Paris Declaration; state in several paragraphs the specificities of country focus for 2007; present the new parameters and requirements for the selection of counterparts; list the counterparts under consideration; and provide specific results and indicators for 2007.

The program objective for all three countries is the same:

“Contribute to ensuring that both women and men, and youth and adults of socially, politically and culturally excluded groups can enjoy their rights and comply with their obligations as citizens without discrimination.”

The following country sections summarize the focus and framework proposed for work in each country according to the *Additional Applications* and their *POAs*.

Honduras

In line with the new policy of geographical concentration, Forum Syd's work in Honduras will be based in Las Lajas and Comayagua in the municipality of Comayagua; in Marcala in La Paz, and La Esperanza, Yaramanguila and Intibucá in Intibucá municipality. The 2007 Additional Application suggests that Forum Syd's experience in Honduras based on collaboration with national and local organizations on a variety of themes points to the need to refocus its work placing greater emphasis on the issue of poverty. This will ensure that the enhanced citizen participation that emerged as a result of the Poverty Reduction Strategy (ERP) will not be demobilized and that the theme will continue on the government and civil society agenda.

The document underscores the need to reorient actions towards medium and long-term processes, supporting diverse sectors and different modalities of collaboration, for example, at the local level, seeking the articulation and consolidation of work linking the ERP and social auditing. One key strategy will be the strengthening of local capacities and local associated municipalities where small consortia and alliances with civil society can be promoted. With the entering into force of CAFTA,²⁹ work with civil society around this theme will be critically important, as will be the Association Agreement to be negotiated with the EU.

During 2007, new parameters and requirements for selectivity for counterparts will be applied. Efforts will be made to coordinate with Swedish NGOs despite the fact that opportunities are limited given the geographical zones where FS works. FS will continue to share important spaces such as the ACI with other international NGOs, where Diakonia, Ibis, Christian Aid, Dan Church Aid, Oxfam and Trocare also operate. Systems of monitoring and evaluation will be strengthened.

The budget total for FS Honduras for year 2007 is SEK 3,020,000.

Nicaragua

The Additional Application for 2007 for Nicaragua follows the same broad outlines as the other country applications with respect to policy towards counterparts, coordination and single country program strategy. The Application does not make specific reference to areas of geographical concentration. The Fund for Gender Equity and Sexual and Reproductive Rights (FED) will continue to be an integral part of the modalities employed for implementation of FS' strategy.

The POA emphasizes FS' intention to work in 2007 in an “integrated” manner with civil society organizations, seeking the harmonization, alignment, and coordination among key actors for the achievement of expected results. The work will seek to strengthen networks and alliances for exchanges on work methods and the development of common strategies.

The Nicaragua program's implementation methodology will include the financing of activities; projects and programs; technical assistance in the formulation of the counterparts' proposals and reporting; seminars for strengthening counterparts capacities; exchanges to contribute to alliance-building and networking with respect to public and international policies and treaties; implementation of a commu-

²⁹ Central American Free Trade Agreement.

nications plan; coordination with donors and international organizations for greater transparency and efficacy in lobbying; and improved follow-up, monitoring and evaluation.

The budget total for FS Nicaragua for year 2007 is SEK 6,511,000.

Guatemala

The FS Guatemala Country Program POA underscores that their objectives are set by the initial 2007–2009 application. The broad program objective for FS Guatemala is to “contribute to ensure that women and men, youth and adults of the Mam and Kiche’ population exercise their rights without discrimination”.³⁰

The POA suggests that laying the foundations for achieving these objectives will require a series of steps to consolidate and strengthen internal processes including setting up a baseline study; establishing the parameters for a VIH/SIDA intervention strategy; setting up an appropriate monitoring and evaluation methodology and system; insuring a strategy for systematizing experiences and “lessons learned”, and strengthening internal structures.

The office will look to enhance the use of national human resources, seeking to bolster the work with advisors, with emphasis in planning, monitoring and development in the regions to support the strengthening of capacities for management and incidence. An international advisor would focus on global development policies.

Geographical concentration will continue to focus on selected zones in the Quetzaltenango region.

The budget total for FS Guatemala for year 2007 is SEK 3,517,000.

4.4 Assessment Framework for the Transition Year

The assessment of the transition year in each country will focus on the five broad areas defined in the *Additional Application for 2007*, i.e.

- 1) shift from thematic programs to integrated country programs;
- 2) greater concentration of efforts in one geographical region per country;
- 3) work with grass-roots organizations when it can affect national level changes;
- 4) improved parameters and selection criteria for long-term counterparts and allies; and
- 5) establishing of systems of monitoring and evaluation.

These issues will be explored in the context of the country focus established in each country’s additional application and with reference to the POAs. However, due to the delayed start of 2007 activities, and the extremely short time frame for the actual implementation of the activities contemplated, the framework and priority criteria for the assessment will not be based on the results and indicators set forth in each country Additional Application.

Before we turn to assessing the principal tendencies in the implementation of the strategy for the transition year, the next section will first look at five key issues which condition such progress:

- the extent to which the country programs constitute a program rather than a collection of projects;
- the institutional set-up and installed capacity;

³⁰ Both are indigenous peoples, are included among the four major ones in Guatemala, and linguistically belong to the Mayan group. While the K’iche population numbers almost 1.3 million, the Mam represents some 600,000. Poverty is extensive in both groups, particularly among the Mam. (*UNDP Human Development Report for Guatemala*, 2005.)

- the human resources; and
- the value-added of Forum-Syd's contribution.

4.5 A Program Focus: Challenges and Constraints

The ToRs for this assessment posed a specific query regarding the first of the five issues noted above – whether FS' activities constitute a “program” or rather reflect a cluster of projects or activities. This question can be approached from different perspectives, and is also complex because there are varying criteria for defining a program. This section will provide some basic criteria for determining what constitutes a program, as well as seeking to differentiate between a *programmatic approach* and *implementing a program*. A qualitative analysis of the program itself will be examined later in the document.

For the purposes of this assessment, we will employ some of the key criteria utilized in a 2003 evaluation³¹ of another Sida-supported program in Central America, which also sought to determine whether the activities undertaken constituted a program. These criteria have been adjusted and expanded for the particular purposes of this assessment. While not definitive, the following seven criteria should serve to shed light on the question being posed:

1. Is there a program document that clearly spells out the interrelationships between the component projects or activities and can be used as a tool for program execution, monitoring and evaluation ?
2. Was the program designed before the component projects and activities were designed and partners selected ?
3. Are there clear functional relationships between the program objectives and project/activity objectives as well as some relationship/interdependency between component activities ?
4. Was there an important degree of communication and collaboration between those who identify and design the program and those who design the component activities ?
5. Do the component projects/activities pertain to one and the same problem area and/or the same geographical region, etc.?
6. Is the entire program and its component projects implemented, supported and/or managed and administrated by one single external cooperation agent ?
7. Is the program designed with a specific time-frame and linked to specific resource allocations ?

The following section will address each of these questions with respect to the country programs.

1. *Is there a program document that clearly spells out the interrelationships between the component projects or activities and can be used as a tool for program execution, monitoring and evaluation ?*

The answer to this question needs to be carefully qualified. The individual *Country Program* documents (and the earlier strategic documents, originally conceived for 2007–2010) do set out how proposed specific objectives and activities interrelate and broadly contribute towards the shared program objectives. No proposed activities appear to be in logical contradiction with the final objectives, nor do they appear to be functionally isolated from each other, at least in the documents (whether such objectives are achievable is another issue.) The Logframes and the country POAs do set the individual activities into a context where they form part of a broader strategy and are intended as complementary and coherent, at least in the document.

However, given the fact of the “transition year”, and the contraction into a little more than a year of what had originally been planned for 2007–2009, it cannot be said that the program document can

³¹ *Swedish/UNDP Governance Programme in Honduras*, (Sida Evaluation Series, 02/25).

usefully serve as a tool for program execution, monitoring and evaluation. The original three-year program was conceived of with objectives which correspond to medium and long-term processes. These objectives have not changed, although the time frame has been considerably reduced. This essentially means that that the strategic vision and goals of the original strategic program documents no longer fully correspond to the actual circumstances of the program. Furthermore, the FS Regional Office is at only present designing and monitoring and evaluation system with thematic indicators well after the programs have been designed.

2. *Was the program designed before the component projects and activities were designed and partners selected ?*

The program was designed before the specific component activities were underway, although the previous program also focused on similar capacity-building and incidence-linked activities. The second part of the question should be modified to take into consideration that it would be highly unusual if none of the original counterparts appeared in the subsequent program given the character and dimensions of civil society in the three countries. However, while the Country Programs and the *Additional Applications* refer to new criteria for counterpart selection, in fact most of the counterparts formed part of the previous program and it is unclear whether or not this new criteria has been fully utilised.

3. *Are there clear functional relationships between the program objectives and project/activity objectives as well as some relationship between component activities?*

While there is a logical relationship between the program objectives and activity objectives, the gap between the highly ambitious goals, FS' modest installed capacity and the radically changed time-frame, means that how "functional" that relationship is called into doubt. There is a relationship between the component activities, although potential synergies between counterparts is not always maximized, and as noted above, the relationship between grass-roots local organizations and national-level NGOs dealing with global issues remains problematic conceptually and practically.

4. *Was there an important degree of communication and collaboration between those who identify and design the program and those who design the component activities ?*

In general, staff involved in the design of the program also were also involved in designing the concrete activities. However, the Regional Director, responsible for the Regional Office POA and the supervision of country programs arrived after the programs had been designed. Further, the thematic advisors also arrived after the program had been designed (HIV-SIDA, gender).

5. *Do the component projects/activities pertain to one and the same problem area and/or the same geographical region, etc.?*

The activities do correspond broadly to "one problem area", i.e. the need to strengthen the capacities and competencies of civil society for the exercise of citizenship and contribute to their positioning on global development issues. There are few activities which seem to sharply diverge from this focus. There is also an effort to concentrate in geographical regions, although the functional link between FS national level counterparts and rural ones seems often tenuous.

6. *Is the entire program and its component projects/activities implemented, supported and/or managed and administrated by one single external cooperation agent ?*

With the exception of the FED in Nicaragua, the program is implemented, managed and financed exclusively by Forum Syd.

7. *Is the program designed with a specific time-frame and linked to specific resource allocations ?*

The original program was designed for a significantly longer time-frame then sharply reduced in the approval process without an accompanying re-thinking of strategic objectives. The original budget was

also reduced, also without an accompanying re-structuring of the proposed broad goals. The answer to this question would then be *yes*, in reference to the original program design, and *no*, in terms of what is currently being implemented.

4.5.1 Concluding Comments on the Program Aspects

Reviewing the criteria above, one is led to conclude that at the *design* level, FS's activities reflect a number of features of a genuine program approach, rather than simply a collection of discrete projects. However, the concrete practical prospects for implementing such a program as originally envisioned were undermined from the outset by the gap between the ambitious dimensions of the program and FS' comparatively modest experience, the existing institutional set-up, technical back-up options from headquarters, and the installed capacity in the field. The existing difficulties (which resulted in, among other things, a considerable delay in reaching what may be called a sizeable degree of implementation) were then further aggravated by the distortions imposed by condensing the program into a new shorter time-frame, and by the damage inflicted by the presently ongoing financial and institutional uncertainty.

If FS's current operations do not correspond to what could be justifiably called a fully functioning programme on the ground, nor is it simply a cluster of miscellaneous activities. It comprises a number of interesting, incipient initiatives many of which could contribute overtime to its significant programme goals. The concrete possibility of mounting a programme as envisioned in the strategic documents was, however, hampered from its inception by the orphan character of the undertaking at an institutional level, which failed to responsibly ascertain the range of requirements for full implementation.

4.6 Institutional Set-up and Capacities

As earlier mentioned (section 3.5), shortcomings related to Forum Syd's institutional set-up and capacities constituted one of the reasons within Sida for the rejection of the initial application for FS's second phase of the Central America Program. It was still brought up as a serious concern by the overwhelming majority of persons interviewed for this study, as well as in a recently undertaken internal survey among FS staff in Central America.³²

In fact, the short period from 2004 up to the end of 2007 has been characterized not only by constant shortcomings concerning the internal organization and FS's field capacities, but also by two important attempts at structural reorganization.

The first reorganization was directly related to the very start of the Program, and reflected the dramatic shift from administering volunteers to the implementation of its own activities and programs. Due to the lack of previous preparations, the problematic staff situation and the limited degree of ownership within the organization concerning the design of the Program, this first reorganization was to a large extent improvised, rather than the result of a plan or coherent instructions from the Head Office in Stockholm.³³ Two major characteristics of the set-up that resulted from this process were:

- each Program tended to create its own organization, with unclear relations to the Director of the (new) Country Office, with scant contact between the programs and with largely undefined work descriptions for most of the staff;
- this implied a lack of coordination along three dimensions: (i) within each and every country (where sometimes several programs were been present); (ii) between similar programs in each and

³² Input study by Cecilia Medal Salaverry, October 2007. This consultancy was explicitly undertaken in order to provide inputs for improvements concerning team performance and staff policies and its main conclusions have been integrated as tasks in the internal Action Plan initiated by the Regional Director.

³³ That is, except for the decision to change the overall structure from just having one office in Nicaragua to the establishing of three national offices (NIC, HON and GUA) and a regional office (located in NIC).

every country (for instance concerning democracy building), and; (iii) between the national level and the regional program.

Two very tangible results from this situation were that implementation became very slow and that most programs lacked the administrative and other capacities to produce Progress Reports and Financial Reports meeting acceptable standards; results which both were observed with concern at Sida-RELA. Furthermore, staff turnover became markedly high.

More or less during this same (first) period, Forum Syd's Head Office was also undergoing a major reorganization, which most likely reduced HQs capacity for providing the field with the administrative and strategic support it so much needed.³⁴ However, also feedback and support concerning the key thematic areas addressed by the new program (democracy and global development issues) appears to have been close to zero.³⁵

In short, institutional capacities to implement and report were limited; activities became poorly coordinated or even fragmented and isolated; there was heavy pressure on the staff (to understand what was really to be done and try to catch up with the delay) and support was scarce.

The second reorganization (which is currently still being implemented) started as a result of Sida's officially transmitted critique concerning the inacceptably low standard of the reports (narrative and financial) submitted by the program. It included measures for improved coordination of the activities (creating integrated country programs), clearer definition and division of responsibilities, tighter financial control, improved quality of the reporting, a review and improvement of the staff situation, etc.

While a fair degree of progress seems to have been made within some of these areas, it is worth noting that the process is perceived very differently depending on the post held by the person interviewed. On the regional management level, ambitions are high and the impression given is not only of having the situation under control but also of continuous progress being made in a joint manner. From the country level, the perception is decidedly less positive, the process is not mentioned as something owned jointly and several circumstances were mentioned as an expression of an excessively centralized system (mainly concerning finances, which allegedly affect the need for flexibility and local knowledge concerning the budget situation).

Concerning communications with HQ, the regional management reflected satisfaction, while the national offices still expressed them to be limited. In this context it should also be mentioned that the current accounting system means that the regional as well as the national offices receive information on their operative cost situation with a two month delay from Stockholm. Diverging perceptions are normal within every reorganization process, but being so markedly level-bound as in this case, they seem to merit further attention.³⁶

Notwithstanding the progress made so far within the current process of reorganization, the staff situation – as reflected in the input study mentioned above – represents important limitations when it comes to the institutional set-up and the organization's capacities. In this context, only three aspects will be mentioned.

Firstly, that staff turnover at a high rate seems to continue, with the majority of the current staff in Central America having been with the organization for less than 18 months. *Secondly*, the majority

³⁴ According to many FS field staff then posted in Central America, it also meant that the reform at HQ was undertaken without the field having a chance of making their voices heard concerning required adjustments of the reform.

³⁵ As vividly expressed by two contemporary key actors in their personal report when terminating their respective period. (Lars Bildt [2007], formerly Regional Director, and Jon Bergeå [2006], formerly Director for one of the programs.)

³⁶ This same pattern is also confirmed in the input study mentioned above, on the staff situation. *Cecilia Medel Salaverry*, [October 2007].

declared that when taking up their respective posts, they did not receive a sufficient introduction or induction process regarding on their exact tasks. *Thirdly*, almost all of the staff expressed that there were no ToRs or job descriptions for their posts (only general guidelines) and that they were unaware of the existence of any functional organization chart for Forum Syd.

Even considering the somewhat negative results that almost automatically may come out of this kind of surveys, these results obviously represent a serious situation – both for the organization’s current efficiency and as a challenge for Forum Syd to resolve in the near future.

However, concerning the staff situation, the most acute and grave problem today is no doubt related to the unacceptable degree of uncertainty regarding the future (with contracts very soon ending for many locally employed staff), due to the absence of a decision from Sida on further financial contributions.

4.7 Human Resources

Human resources continues to constitute a critically weak link in Forum Syd’s set-up for the implementation of the programs and its efficiency in achieving established objectives. Several aspects concerning this situation have been mentioned earlier in this Report, of which some merit to be repeated:

- short contracts (national staff usually 1 year, international 2 years)
- high rate of staff turnover
- inadequate preparations of the staff in relation to tasks to be performed
- unclear responsibilities and division of labour
- shortcomings in the staff’s knowledge concerning the organization, its structure, basic values, its activities in other countries and continents, etc.

One key dimension which thus characterizes the organization in the field is a *lack of continuity*, in relation to the program as well as to organizational matters. This shortcoming cannot be compensated for by the elaboration of specific documentation (even if these obviously are important). An related aspect of this is the reduced capacity of Forum Syd (in Central America and related staff in Stockholm) to be a *learning organization*.

The reasons for this last and serious deficiency are a combination of, among others, high staff turnover and lack of linkages between the field offices and headquarters in Stockholm (where staff continuity do exist). The high staff turnover is clearly related to considerable discontent among the personnel, where salaries, other benefits and the work situation are the factors most frequently mentioned.³⁷ Former field staff rather seldom continue to headquarters and national staff have no possibilities (or, currently, motivation) to seek new posts on different locations within the organization. The sometimes very informative and outspoken personal reports written by international field staff after finishing their contract seems to go unread or at least undiscussed at headquarters and hence fed into a process of learning and reform.³⁸

The short contracts, finally, are difficult to reconcile with the ambitious processes that the programs are to facilitate, which require a considerable degree of continuity. Other consequences of this context are likely to be that many staff members will either tend to become frustrated (because time is too short for them to see any results of the job done) or they will, in practice, contribute to a kind of implementation

³⁷ See, for instance, the recent survey by *Cecilia Medal Salaverry*, [October 2007].

³⁸ Two examples of highly relevant and authoritative Reports in this context is the one by *Jon Bergeå* (who was the first Coordinator for the global development issues program in Nicaragua, and the one by *Lars Bildt*, who was Regional Director during the first period of the Program. [See the Appendices section for complete references.]

which re-defines what count as results, thereby returning to the traditional roles and concepts which the program was designed precisely to overcome. A third possibility is of course to resolve the situation by adopting an attitude of relative indifference.

According to information dated December 2007, the current staff of Forum Syd in Central America amounts to 24 persons, of whom 14 are nationals and 10 internationals (mainly but not only Swedish). This implies an increase in the proportions of national staff – also within the categories of country representatives and advisors – which represents an important step forward when it comes to preparing the potential for more of continuity and local knowledge. However, given the current situation, with almost total uncertainty concerning future funding of the program, this still remains potential only.

The short contracts and the recruiting – still – of rather many (often young) Swedes as “advisors” for complex themes in countries from which they generally have no or limited previous experience no doubt continues to reflect features from the modality that long since was to be overcome: the sending out of volunteers. To be sure, this in turn is tightly linked to financial and other conditions contained in the modalities (within Sida) under which Forum Syd so far has received its main funding.

With the decision at FS’s General Assembly in 2007 to start its own fundraising (in order to get access to other financial modalities, within Sida, the EU etc), the organization may have a genuine opportunity for changing current patterns concerning contract-periods and preferred recruitment locations. (Also salaries for locally recruited key staff would probably need a review in this context.) Even if this doesn’t occur, the current and serious functional incongruity between complex programs and the actual staff situation need sbe addressed and adjusted.

4.8 What is the Value Added of Forum Syd in the Programs?

The question above appears as a key theme to be addressed in the ToRs for the present analysis, where it is specified as follows:

“Apart from providing funding, which are the specific or unique qualities of Forum Syd in relation to its partner organisations... (such as thematic expertise, lobbying, financial systems, planning processes, methodology)”?

In this context, a few words on the definitions or the use of the terminology may be merited, particularly as the discussion on “added value” may be rather tricky conceptually³⁹ and also runs the risk of resulting in abstract assertions only. For this purpose, we may start by distinguishing between two different kinds or applications of the concept of value added.

Firstly, there is one kind of value added which is not related to an organization’s core tasks or special capacities but rather is (almost entirely) situation specific. This may be because the competence for achieving a value added was created precisely for that specific situation (example: the knowledge needed for Forum Syd as a manager of Sida’s Gender Program). It may also appear simply because in relation to other organizations with some degree of presence in the same context, FS represents something asked for which is not their real speciality but is entirely lacking among the others. (Example: some of the projects with grass-root organizations where FS has been providing close accompaniment, which probably several other organizations could do as well, but don’t have the resources or the strategy to undertake.)

Both these varieties of *situation specific* or *relative* value added are likely to be *temporary capacities* within the organization only (not becoming part of its core competence and core activities). As a consequence,

³⁹ What is, for instance, the relation between “value added” and “comparative advantage”, and how relativistic or absolute in its contents may the concept “value added” be?

they are often not cost-efficient and generally do not give the organization a comparative advantage (in relation to others within the same area).

Secondly, there is a kind of value added which is directly and organically linked to the organization's core competence and activities and which thereby are *permanently maintained* and developed. This kind of value added could be thematic – like the knowledge and expertise represented by Save the Children – or more related to methods and approaches – like among organizations working with cooperative development. In the case of Forum Syd, this kind of value added is very visible in Sweden, when the organization fulfills its role as a platform for NGOs involved in international development, functions as a technical support entity for smaller Swedish NGOs in their elaboration of applications to Sida and when they carry out advocacy campaigns (based on independent analysis) related to selected global development issues. This kind of value added is generally intimately linked to – and constitutes part of – the *identity of the organization*.

In contrast to the first kind of value added, this core value added often implies that activities may be cost-efficient and that the organization's capacities within the field often do have a comparative advantage.

Concerning Forum Syd's program in Central America in the context of value added, our analysis has generated the following observations and assertions:

- i. the core functions and special skills of the organization in Sweden are only to a very limited degree reflected in the composition of the programs;
- ii. the components which do reflect special skills represented by the organization (advocacy campaigns related to global development issues) have generally been weak, partly due to a lack of integration of the different programs but mainly as a result of the lack of response and support from headquarters;⁴⁰
- iii. the management of Sida's previous gender program and the current multi-donor program FED has created situation specific value added which could become less temporary in its character. However, no focal point for gender has been established at HQ for the organization as a whole, nor have other ways been created of capitalizing on the expertise generated in order to turn it into a core line of activity;⁴¹
- iv. a similar pattern applies to the theme of citizen's rights and democracy, which plays a prominent role in the composition of the programs (not only in Central America) but remain temporary capacities in relation to the organization as such.

Summing up, FS's programs in Central America do not capitalize on the organization's main identity and core competence, and there is no visible flow the other way either with experience from common thematic activities in the field becoming new main lines expressed in priorities and organizational adjustment at HQ and other levels of the organization. In conclusion, within some of the program components Forum Syd do represent value added – but mainly of the category above defined as temporary or relative value added. This implies that the programs are rather vulnerable (due to the limited reproduction and development within the organization as such of the specific skills required for ongoing activities) and it is also likely to be related to relatively low levels of efficiency.

⁴⁰ This ironic paradox is vividly exposed – and proposals made – in the personal reports of *Bergeå* and *Bildt*, respectively. The campaign against FMI's conditionalities vis-à-vis Nicaragua, carried out together with the umbrella organization *Coordinadora Civil* in Nicaragua during 2006–2007 (which apparently was very successful), is so far the only real exception.

⁴¹ The lack of adequate support from (and capacity within) HQ concerning this theme was also mentioned in the recent external evaluation of the Gender Program. (*Carolina Wennerholm/Fátima Real*, [2006]).

4.9 Assessment of Selected Tendencies during the Transition year 2007

As explained in the introductory section of this report,⁴² a number of factors combined to make it extremely difficult to scrutinize the results of the “transition year” based only on the country-specific indicators which appear in each of the Additional application for 2007. The very short period for which the program has been in operation; the absence of progress reports (so far) for the period in question; the short time frame for the mission and its timing, required that the consultants shift the emphasis of the assessment to more broadly analyze progress and tendencies in the five areas defined in the *Additional Application for 2007*:

- shift from thematic programs to integrated country programs;
- greater concentration of efforts in one geographical region per country;
- work with grass-roots organizations when it can affect national level changes;
- improved selection criteria for long-term counterparts and allies; and
- establishing of systems of monitoring and evaluation.

These were the most significant and fundamental changes established for the three country programs, and are also the ones that can best be assessed given the constraints noted above.

A. *Shift from Thematic Programs to Integrated Country Programs*

The shift to integrated country programs is clearly a work in progress, in spite of the fact that the combination of a new mandate, changes in personnel and a new institutional set-up on one hand, with vacancies, and uncertainty vis-a-vis the future on the other has made the process very challenging.

The new overall structure with a Regional Office and Country Coordinators should in theory help delineate roles and mandates, and provide a structure of overall supervision and technical backstopping provided by thematic advisors. In practice, the precise nature of responsibilities and roles as distributed among the regional office and individual Country Offices needs further clarification.⁴³ While the regional office stressed the significant “autonomy” of the country programs, it would seem that an ongoing dialogue on technical, political and strategic issues would be important, for example in the case of the most appropriate role regarding national and global issues in the complex country situation in Guatemala.

The geographical focus and the reduction of counterparts in each country should also serve to consolidate the national rather than thematic focus. In reality, unsurprisingly, many of the counterparts have remained the same, which has the advantage of allowing FS to draw on past experience with the counterpart, and the disadvantage that the patterns of the previous work modality often tend to continue.

A crucial tool for the strengthening of the country programs as such would be the elaboration of effective monitoring and evaluation tools, which would allow them to not only measure results of “activities” but to analyze the synergies and degrees of integration of the program’s distinct goals and objectives. Unfortunately, these systems are not yet up and operating.

⁴² Section 2.3.2, “Difficulties and constraints”.

⁴³ Country Offices have indicated that while the financial structure remains highly centralized, their technical dialogue with the Regional office remains more limited.

B. Greater concentration of efforts in one geographical region per country

The Honduras Country Program is clearly geographically concentrated in the departments of Comayagua, Intibuca' and La Paz, with an office conveniently based in Comayagua. These areas are some of the poorest in Honduras, in line with FS stated country strategy to better articulate their activities with the poverty issue.

The Guatemala Country Program is geographically concentrated in the central eastern region of the country, including zones in the departments of Totonicapán, Quetzaltenango, El Quiché' and San Marcos. This coincides with their strategy to focus their activities on the Mam and Kiche' indigenous populations. The FS office is based in the city of Xela in Quetzaltenango. However, there is an ongoing internal discussion regarding the possible transfer of the Country Coordinator to Guatemala City for an enhanced focus on national issues.⁴⁴

The Nicaragua Country Program continues to be based in Managua, along with the Regional Office, although before the uncertainty regarding continued funding had become felt, the country program intended to establish the program office in the northern city of Estelí. The geographical concentration in northeastern Nicaragua includes counterparts in the departments of Estelí, Matagalpa, Jinotega, Nueva Segovia and Madriz. National counterparts that fall outside these geographical areas are either based in Managua, or are financed through the Gender Fund (FED).

Greater concentration in specific geographical areas is an important step to allow the country programs to consolidate processes over time, develop expertise in the specific area problematic, and eventually accompany counterparts in developing the sought after links/alliances between local-level and national counterparts.

C. Work with grass-roots organizations when it can impact on national level changes

The *Additional Applications for 2007* all refer to linking the "local incidence work with national and global work", a long-running theme and strategy of FS. This is a very complex and ambitious area where the country programs continue to face challenges. Given that this goal can only be part of a medium and long-term process, it is difficult to assess concrete advances in this direction in the very short time period in which the country programs have been operating. While interesting initiatives regarding national development issues have been carried out by FS' urban-based NGOs and consortia in the country's capitals (such as the past work with the *Coordinadora Civil* in Nicaragua concerning the conditionalities from the IMF), the linkage between local-level grass roots organizations and national level organizations and issues has been more tenuous.

Linking local-level organizations, even if they are consortia of municipalities, to national level policy work is a very major organizational and political challenge. Many of the local-level organizations supported by FS are financially fragile, organizationally still in need of strengthening, and logically focused on citizen participation at the community and municipal level. Furthermore, they are often geographically isolated and thus do not have convenient access to national-level organizations. Building truly functional networks across municipalities is obviously a logical step in building citizen participation and influence over national level policies, but tends to occur when each local level organization has become sufficiently organizationally and technically solid to expand their field of operation. This suggests that it occurs within a much longer time frame, and that the need for support is both continuous and at periods considerable.

⁴⁴ Such a transfer would obviously have far-reaching consequences, and it is the consultants' opinion that this move would be ill-advised without first undertaking a profound analysis and discussion regarding the most appropriate and realistic tasks for Forum Syd, given institutional limitations, ongoing commitments in Xela, and the current situation in the country.

Many of the most interesting grass-roots activity where FS definitely can show the one variety of “*value added*”⁴⁵ can best be seen precisely at the local level, where FS has strengthened capacities at the community and municipal level, on themes of social auditing and political incidence on issues of key importance to the communities. This is particularly true at present for Honduras and Guatemala.

Forum Syd’s support for *Interforos La Paz* in Marcala showed strong levels of activity regarding social auditing; support for the strengthening of the municipal network, La COL in Las Lajas, Comayagua has contributed to vibrant social organization around a variety of social issues; and support for the CSO *Las Hormigas* in Intibucá has provided support for a unique organization working on gender issues. While these organizations are aware that the challenges they face are linked to broader national phenomena, they are clearly predominantly (and understandably) focused on local issues. In Guatemala, the processes in Huitán and San Marcos that FS is supporting are both focused on community participation and local development issues, in particular related to the local impact of mining and petroleum extraction mega-projects – an issue with a strong national dimension.

The Honduran country program has a specific advisor for global issues and continues to work with three national Tegucigalpa-based NGOs which deal with such national issues as the impact of the “free trade” agreements, the external debt and current negotiations on new international trade agreements (such as the one with EU). One of them, the *Honduran Coalition for Citizen Action (CHAAC)* has become the central reference point for such issues for civil society in Honduras. While this national level organization is constituted by the most important national networks, they have no clear relationship with FS local level counterparts. This lack of a relationship between FS local level counterparts and national ones so far also appears to characterize the two other country programs.

The Guatemala program’s work for this transition year with organizations based in Guatemala City remains still very incipient and has not been developed.

Nicaragua has developed the most activities related to national level policies during this period, due to a variety of reasons, including a longer tradition of social organization and a greater proliferation of consolidated NGOs; an office in Managua with thematic advisors; the converging FS issues of gender, sexual and reproductive rights and citizen participation with a heated national debate on therapeutic abortion and citizen councils.⁴⁶

D. Improved parameters and selection criteria for long-term counterparts and allies

The *Additional Applications for 2007* noted that the Country programs would make use of new parameters and selection requirements during the transition year. In fact, the existing counterparts from 2006, were permitted to maintain their relationship with FS in each country for the first six months of the transition year if they had either a strategic plan in execution; a POA for 2007; or an incidence plan in execution. In effect, this meant that the reduction of counterparts was not to occur until July, 2007.

The new criteria for selection of counterparts appears in the original strategy documents and covers such issues as: correlation of themes and strategy with those of FS; strategic potential; work modalities that focus on the construction of citizenship, social mobilization, the construction of alliances and political incidence; internal democracy; legal status; management and administrative capacity; and organizational sustainability.

⁴⁵ In this specific context understood as “valued added” as compared to the support provided by other organizations to the same counterparts.

⁴⁶ The fact that Forum Syd managed Sida’s special gender program during many years and since 2006 has been responsible for the “*Fondo para la Equidad y los Derechos sexuales y reproductivos (FED)*” – initiated by the Embassies of Finland and the Netherlands in Nicaragua and currently with contributions also from UNFPA, Sweden, Germany, Austria, Luxemburg and the UK – has made FS a well-known organization and implies the participation in several broad contexts.

Based on a revision of lists of counterparts, it seems that almost all of the counterparts for 2007 are in fact previous counterparts.⁴⁷ This being true, it is not completely clear to what extent the “new” parameters and criteria mentioned above served as an effective new tool in the selection.

E. Establishing of systems of monitoring and evaluation to insure better measurement in goals, indicators and expected results.

The need to establish M&E systems to better measure results is an issue that virtually everyone involved in FS work has broadly acknowledged as a critical necessity. The absence of such tools in the past is closely linked to non-operational formulation of objectives, poor reporting and the inability to analyze and interpret results and achievements, as well as to identify and correct poor practices. The concern related to these deficiencies and commitments to improve the situation appears in a number of evaluations and all country POAs list the M&E system as a central activity/and goal for the transition year. The Regional Office now has one staff person dedicated to this issue. The Regional Office Director stressed the organization’s commitment to results-oriented work modalities in order to generate more concrete results and more concrete reporting.

The actual elaboration and implementation of an M&E system for the country programs is still being awaited. It was the understanding of the mission that FS headquarters in Stockholm is currently developing a methodology which would provide inputs for further development in the region, but this work is still not complete. At present it appears that indicators from the POAs are being used for monitoring purposes. The individual country offices seemed unclear as to when M&E systems would be in place.

5. Likely Consequences of the Phasing-out of RELA Support

5.1 Introduction

In order to contextualize the analysis concerning the likely impacts of a termination of RELA support to Forum Syd’s Central America Program, it may be useful first to recall some main characteristics of the program currently being implemented and the counterparts involved.

5.2 The Character of the Programs

On a general level, all the three country programs share the same long-term objective, expressed as:

“to contribute to a participatory democracy and sustainable development”.

Within this over-all strategic framework, each of the Programs also possesses certain country-specific features.

5.2.1 The Guatemala Program

In this country, the program’s main focus is to *promote gender-equity and a rights-based approach, mainly among indigenous groups.*

For improved effects and impact, a geographical concentration is to be established, focusing on four provinces, San Marcos, Quiché, Quetzaltenango and Totonicapán with a majority population from the ethnic groups of Mam and K’iché. Here, Forum Syd works mainly with grassroots organisations that

⁴⁷ “Seems”, because the lists of counterparts and the counterparts appearing in the POAs with disbursements made during 2007 are not entirely congruent.

seek to have a political impact in order to achieve a society without discrimination. The interest groups are women and men of all ages from the Mam and K'iché peoples, mainly from rural areas and living in poverty or extreme poverty. Alliances are to be established also with other strategic stakeholders, such as agencies, other donors, national and international NGOs.⁴⁸

5.2.2 The Honduras Program

In Honduras, the main focus is slightly adjusted and is defined as *promote gender-equity, local democracy and strengthened rights of marginalized groups*.

In this country, the program gives more emphasis to poverty issues and FS intends to work with organisations that aim to improve livelihoods and opportunities for democratic participation for socially, economically and culturally marginalized groups, among those women subjected to discrimination and domestic violence, indigenous groups with a history of political, social and cultural exclusion. For improved effects and impact, the geographical concentration will focus on central Honduras, comprising the provinces of Intibucá, Comayagua and La Paz, an area with high levels of poverty and a large percentage of indigenous people of the Lenca ethnicity. The programme will work mainly with member-based organisations, but also with NGOs.⁴⁹

5.2.3 The Nicaragua Program

Here, the main focus of the program is defined as *to promote gender-equity and a rights-based approach*, initially without any mentioning of specific groups such as in the cases of Guatemala (“indigenous groups”) or Honduras (“marginalized groups”).

However, when proceeding in the Program Document, the focus becomes more specified, and the program is to work with organisations that aim to improve living standards and opportunities for democratic participation for socially, economically and culturally marginalized groups, among those youth (boys and girls), HLBT-persons (lesbians, gays, bisexuals and transsexuals adult and young, women and men), persons with disabilities (adults, youth women and men) are of special interest. Other identified groups of interest are people from rural areas, migrants and prostitutes.

The orientation is to work both with member-based organizations and NGOs. Through member-based organisations, mainly at the local level, the program aims to contribute to the long-term development of a democratic culture. NGOs, at local and national level, are often effective and efficient channels to reach policymakers. Also in Nicaragua, a geographic concentration is being sought, in this case in the northern region of the country, characterized by with high poverty levels and active ongoing local development initiatives.⁵⁰

5.3 The Counterparts

In general terms, Forum Syd's counterparts in the Central America Program fall into four broad categories (although there are some combination organizations):

1. *Grass-roots and community organizations*: associations of citizens of a local or territorial character, whether organized at the level of neighbourhoods, townships, or municipalities, including organizations of adolescents and youth; and community-level women's organizations.
2. *NGOs which have developed a strong degree of expertise* in specific themes and can play an important role in training and education of interest groups in such areas as political incidence
3. *Networks, consortia and umbrella organizations*. These organizations are key for consensus-building around key issues and maximizing results of lobbying activities

⁴⁸ Forum Syd: Guatemala Program, 2007–2010.

⁴⁹ Forum Syd: Honduras Program, 2007–2010.

⁵⁰ Forum Syd: Nicaragua Program, 2007–2010.

4. *Cooperatives and unions*; organizations of peasants, workers, artisans which promote particular rights and interests. These organizations often have a more direct link to income generation issues and projects.

In general, the nationally-based NGOs and consortia tend to have more diversified sources of funding, while the local-level associations based in the rural zones tend to be more financially dependent upon FS. The latter group generally also has much less knowledge and management capacity for activities aimed at achieving new sources for funding.

5.3.1 Counterparts in Honduras

In its tentative 2007 partner list FS Honduras identified 11 counterparts, which later was reduced to 9. The majority of them are located in the geographical zones of concentration, while three organizations are based in Tegucigalpa and correspond to categories 2 and 3 noted above.⁵¹

Most FS partners are grass roots organizations and/or networks in the Comayagua, Intibuca' and La Paz areas, a zone which combines high levels of poverty, a large percentage of indigenous people of the Lenca ethnicity, and good conditions (existing networks) for working on citizen participation issues.⁵²

5.3.2 Counterparts in Guatemala

FS Guatemala has 13 counterparts noted in their 2007 POA (three of which correspond to organizations still to be selected for a seed-money fund). They are almost all grass-roots organizations or social movements comprised of community members and leaders, located in the rural areas selected by the program and attended by the Xela office. Five of the organizations' are constituted by the indigenous Kiche' population and three (one constitutes a process composed by four separate organizations) are of the indigenous Mam population.

The current counterparts are almost all organizations that participated in the previous *Local Democracy Program* of Forum Syd which focused on the strengthening of grass roots organizations representing sectors historically excluded from local political processes. Many of the organizations do not have diversified funding or their other sources tend to be earmarked for productive projects.

According to a recent external evaluation, these processes and organizations face a wide range of very challenging obstacles to their strengthening and institutional sustainability,⁵³ many of which are historical, structural and external, such as the extreme poverty, internal and external migration, the lack on political will of institutions and authorities, illiteracy, mono-lingualism, and the historical discrimination faced by the indigenous groups.

5.3.3 Counterparts in Nicaragua

According to a recent follow-up of the 2007 POA,⁵⁴ the Forum Syd Nicaragua Program has 21 counterparts, 5 more than are listed in the Additional Application for 2007.

⁵¹ *The Honduran Coalition for Citizen Action (CHAAC)*, based in Tegucigalpa is an umbrella NGO working on issues linked to the impact of the "free trade" agreements; the *Social Forum on the External Debt and Development of Honduras (FOSDEH)*, has expanded its original focus on the debt to working on the Poverty Reduction Strategies in specific geographical areas; and the *Honduran Center for Women's Studies (CEMH)* promotes the strengthening of citizenship for women, and coordinates activities from the local to the international level.

⁵² Among these are *La COL*, which is a municipal network in Las Lajas comprising over 20 different community organizations (water associations, cooperatives, youth groups, health committees, etc.); *Interforos La Paz* which is a civil society network at the departmental level which includes similar groups and focuses on strengthening citizen participation and social auditing. Another network, the *Institutional Network against Violence* in Comayagua combines public and private institutions that seeks to address the issue of domestic violence. FS also supports a smaller NGO in La Esperanza called *Las Hormigas* which works on the promotion and defence of women's rights.

⁵³ Informe Final de Evaluación Externa del Programa Democracia Local (PDL) en Guatemala (p. 14).

⁵⁴ Dated 31 August, 2007.

The counterparts within Forum Syd's Nicaragua Program cover the full range of categories noted above, including well-known and established umbrella organizations based in Managua, such as the *Coordinadora Civil*; national networks such as the *Red Nicaragüense por la Democracia y el Desarrollo Local (RNDDL)*; Managua-based NGOs such as *Cantera*, *Puntos de Encuentro* and *Si Mujer*; local-level NGOs such as *Nakawé* and *FUNDEMUNI*, local-level associations such as *Octupán*, *Oyanka* and *Movimiento Comunal Nicaragüense* (its local chapters in Palacagüina and Yalagüina). Six of the organizations are based in the northeastern area of the country which FS Nicaragua has selected as the area for geographical concentration.

5.4 Likely Consequences of a Sudden Termination of the Support

This section summarizes the consultants' conclusions concerning the impacts of a "sudden termination" of the RELA support to Forum Syd's Central America Program, against the background and analysis earlier exposed in the present Report. The expression "sudden termination" is here used to refer to one of the likely time-frames mentioned in the ToRs for this assignment, that is, a termination of RELAs financial support by December 31, 2008.

1. Such a short time-frame would, in our opinion, generally not be compatible with undertaking an appropriate *phasing-out* of the ongoing activities and processes (permitting the consolidation of results, systematic searching for alternative funding and new allies, etc)⁵⁵ but would rather come close to a simple *shutting down* of the programs.
2. To begin with, this would most likely imply serious difficulties for Forum Syd to maintain its core field staff, indispensable for undertaking any kind of serious phasing-out and gradual closing down of the programs, thereby engendering a series of administrative problems, as well as loss of important experiences.
3. *In Guatemala*, all or almost all of FS's current counterparts are likely to suffer very considerable impact from a sudden termination of support from Forum Syd, both in financial terms and in terms of organizational support. As Swedish development cooperation for Guatemala will continue, and as Forum Syd currently is working with indigenous peoples and their rights (a theme often emphasized by Swedish representatives in Guatemala), a sudden "shutting down" of current activities within the FS Guatemala Program could also provoke some politically negative consequences.
4. *In Honduras*, the nationally-based NGOs and consortia of CSOs currently supported by FS, would probably have few difficulties in overcoming the financial part of a sudden termination of the support. However, for the majority of FS counterparts – which are locally-based – a rapid termination would imply a serious loss of resources and direct organizational support. As regards the political dimension, a sudden termination of the FS Honduras Program may on one hand be said only to repeat the message already conveyed at a Governmental level – that Swedish bilateral development cooperation is leaving Honduras. On the other hand, however, a sudden termination of the Swedish support for a program implemented by CSOs would contrast negatively with the longer period already announced for the phasing-out of the bilateral activities.
5. *In Nicaragua*, finally, a considerable number of Forum Syd's counterparts are likely to be able to find other sources for financing and new allies for other kinds of support needed to consolidate ongoing activities. However, considering some of the principal characteristics of the political situation in the country during this period – with serious regressions for the respect of basic human rights (particularly women's rights) and for the functioning of democratic governance – many observers (the consultants included) consider this to be a strategic period in time for civil society and their organi-

⁵⁵ With a somewhat longer time-horizon applied, FS may also have the possibility of achieving results from its own fundraising activities.

zations. Without a strong and reasonably united civil society – enjoying international support on these themes – the perspectives for reversing today’s negative trends become considerably gloomier. In this context, a *shutting down* of a CSO operated program deeply involved in these themes is likely to have negative political consequences – unfortunately precisely within thematic areas always given priority and emphasized by Sweden. The fact that the Swedish Governmental development cooperation program with Nicaragua (as in the case of Honduras) will enjoy a considerable period for its phasing-out, may in this context aggravate the political consequences of a rapid withdrawal of the support for civil society.

6. Recommendations

6.1 Concerning Forum Syd

- j) That Forum Syd as an organization (headquarters and field together) analyze and define their *value added* and *comparative advantage* with respect to having country programs in Central America. This analysis should include a systematic exploration of how their identity and historical experience in Sweden – with respect to its character of constituting a platform or umbrella organization with special skills concerning strategic global policy analysis and advocacy – could be better utilized and related to future core activities in the Central American Region. (Concerning what to do, how and with whom.)
- k) In this context, a detached analysis based on concrete knowledge of Central America should also be done concerning the kind of qualifications for human resources required for the undertakings and roles defined above, without letting current funding mechanisms and conditions stemming from these limit the character of the analysis.
- l) That Forum Syd develop and apply a policy for taking decisive steps towards becoming a *learning organization*. This includes mechanisms for the systematizing of experiences (generating best practices which then must be disseminated etc); developing better linkages and exchange between HQ and the field, with enhanced capacities at HQ for technical support and coordination; methods for taking stock of staff experience; systems for rotation of staff and broader career opportunities for locally employed personnel.
- m) That Forum Syd Headquarters as a matter of urgent priority undertake a rigorous revision of their current *de facto* human resources policy, with attention not only to recruitment, but to training, staff descriptions, salaries and all other pertinent aspects of staffing. The conclusions of this revision should thereafter be widely disseminated among the staff and an Action Plan be elaborated and implemented.
- n) That Forum Syd assign highest priority to ensure the development of the much-referred-to systems for monitoring and evaluation, making them operational without further delay and giving all support needed to the offices for its practical application.⁵⁶
- o) That Forum Syd’s program teams in Central America identify their strategic and technical back-stopping needs, generating an Action Plan within HQ on how to swiftly and sustainably satisfy these needs.

⁵⁶ In this context, the situation concerning the needed base-line studies should also be addressed and resolved.

- p) That Forum Syd strengthen political dialogue, coordination and knowledge-sharing with other Swedish NGOs (which generally also are member organizations within FS) present in Central America.
- q) That Forum Syd – in case the Central America program will be soon phased out – develop a systematic plan in order to grant counterparts the time period needed to consolidate ongoing activities, also assisting them in the search for alternative funding and new allies.
- r) That Forum Syd – in order to diminish outside financial dependency and to insure reasonable periods of phasing-out, should that become a task to be performed – without delay proceed according to the 2007 General Assembly decision concerning the initiation of fund-raising for own activities.

6.2 Concerning Sida-RELA

- f) That decisive measures are taken to improve procedures for the review and assessment of applications from Swedish NGOs, ensuring both an appropriate quality of the analysis and a reasonable time frame.
- g) That the division of responsibilities between RELA and the Embassies concerning the follow-up of programs implemented with RELA-funding is clarified and the tasks to be undertaken more precisely defined.
- h) That a decision promptly is taken which ends the current situation with almost total uncertainty for Forum Syd, its staff and counterparts concerning continued funding for their ongoing Central America Program.
- i) That in case the decision will imply the termination of RELA-support, the final time period and funding granted will be sufficient to permit Forum Syd to carry out a technically appropriate and ethically acceptable phasing-out period, supporting counterparts to consolidate initiated processes as well as to seek alternative funding and new allies.
- j) That in case a decision on the termination of RELA support is taken, key criteria for defining the magnitude and length of the phasing-out process of activities in Central America should include *(i)* the different character of the organizations supported in each country, and; *(ii)* the importance and role of civil society in the current political short to medium-term situation in each country, related to core development issues such as respect for human rights and democratic governance.

Annexes

1. Terms of Reference and Quote for the Assignment
2. The Mission Itinerary
3. List of persons met/interviewed
4. Documentation consulted

Annex 1 Terms of Reference

External analysis of Forum Syd's development of country programmes in Central America (Honduras, Nicaragua and Guatemala) during 2007, and consequences of phasing-out of support from the appropriation for Latin America

1. Introduction

1.1 Background

In 2004, within the framework of RELA's guidelines for support to Swedish NGOs from the appropriation for Latin America, RELA decided to support Forum Syd's democracy and regional influence programmes in Central America 2004–2006 (RELA Decision 91/04) with a total amount of 21.3 MSEK. Although regional in their focus, the programmes encompass three countries; Honduras, Nicaragua and Guatemala. Also, it bears mentioning that during this period (2004–2006), the Embassy in Managua has supported a gender equality programme implemented by Forum Syd which has been closely related to the programme supported by RELA (this programme has already be evaluated).

In December 2006, RELA rejected an application from Forum Syd for a two-year support to three country programmes (Honduras, Nicaragua and Guatemala). In February 2007, on the basis of a new application from Forum Syd, RELA decided to extend the support to Forum Syd with one year and provide additional funds totalling approximately 8 MSEK (Sida Decision 2007-001017).

The first (rejected) and second (approved) applications from Forum Syd are both based on a regional strategic plan for 2007–2010. In brief, there are two especially significant changes in relation to the programmes supported by RELA 2004–2006. Firstly, a change from regional thematic programmes to three country programmes encompassing three main priorities perceived to offer possibilities for synergies. Secondly, a decreased number of partner organisations with more emphasis on mutual responsibility for attaining effects and results etc. Thus, during 2007 Forum Syd will find itself in a process of transition. It also bears mentioning that in Nicaragua, Forum Syd has taken on the role of administrator of a fund for gender equality, where funds are provided by several international donor agencies, including Sida.

RELA's plans to carry out an external analysis of Forum Syd's programmes in Central America was communicated to Forum Syd during the autumn of 2006. Originally, the analysis was planned to be made during June–August 2007, but as it became clear that the conditions for Swedish development cooperation in Latin America were to change, RELA decided to slightly postpone the study.

1.2 A mixed picture- But positive tendencies

An important reason for the decision to extend the support to Forum Syd to 2007 was that RELA and the Embassies in Tegucigalpa, Managua and Guatemala City made the analysis that although the current programmes came off to a slow and poor start, there had been evident progress especially during 2006.

Nevertheless, it seems likely that Forum Syd and its programmes in Central America still display certain aspects that need further scrutiny and development. For instance, reports submitted to RELA have been weak, and there has been an unreasonably high level of staff turnover at the field offices. The initial assessment of Forum Syd's application 2006 brought up a number of points of critique regarding Forum Syd's original application as well as their current work in Central America. Some of these issues were addressed in a credible way in the application for extended support, e.g. the process of selecting partner organisations and staff intensity at the national offices. The final narrative report for 2004–2006 also gives extensive space to reflections and analysis of the experience thus far (lessons learned).

1.3 Changing conditions for Swedish bilateral development cooperation in Latin America

During 2007, the conditions for Swedish development cooperation in Latin America has changed rather drastically. In brief, in August the Swedish government took a decision implying that the number of prioritised countries for development cooperation decreased, especially in Asia and Latin America. As of September, the frameworks for time-tables and scopes etc. regarding the elaboration and implementation exit strategies is being defined by the Swedish government. Nonetheless, it is clear that phasing-out processes of the Swedish bilateral cooperation in Honduras and Nicaragua, including direct funding from RELA to Swedish NGOs, will start in a near future. When it comes to Guatemala, although it will remain a prioritised post-conflict country for Swedish development cooperation, it is still unclear what this will imply in terms of funds available. It appears likely that a cooperation strategy for Guatemala will be elaborated during 2008. All in all, it seems reasonable to anticipate a gradual and significant decrease of funds from the Swedish national budget allocated to development cooperation in Latin America.

Another change that has direct bearing on the prospects for future funding to Forum Syd from RELA, is that during 2007, RELA has initiated a process of changing the so-called system for support to Swedish NGOs from the appropriation for Latin America (introduced in 2003). Hence, during the spring 2007, RELA informed Swedish NGOs that it would not elaborate instructions for applications from Swedish NGOs for 2008. In August 2007, RELA hosted a seminar on civil society in Latin America to which Swedish NGOs were invited, and the ambition is to maintain an open dialogue on future support models with stakeholders. Hence, the final result of this process is still open-ended, partly because it has to be guided by the pending strategy processes.

Obviously, the two abovementioned changes in the conditions for Swedish development cooperation in Central America will have direct implications on Forum Syd's work in Honduras, Nicaragua and Guatemala, especially in terms of receiving funding from RELA.

2. Purpose of the external analysis

RELA intends to commission an external analysis of Forum Syd's programmes supported by RELA since 2004. While it certainly would have been possible to focus on achieved results (i.e. look back), given the abovementioned context with radically changing conditions, it has been concluded that it is more important to apply a time perspective focusing on the present and the future. First, it appears highly relevant to undertake an analysis of how Forum Syd has been addressing its weaknesses and strengthening its work so far, i.e. assessing development within the process of change agreed upon with Sida/RELA and how achievements could be further enhanced. Second, in a situation making the prospects for future support from RELA highly uncertain, it is pertinent for Forum Syd as well as for RELA receive inputs for an analysis of different scenarios and their possible consequences for partner organisations and target groups.

These terms of reference have been elaborated in consultation with the Embassies/SDCs in Guatemala City, Managua and Tegucigalpa.

A draft version of these terms of reference was also discussed between RELA and Forum Syd at the annual review meeting in Stockholm on September 19, 2007.

2.1 Objectives

The study has two main objectives:

- a) To analyse and assess developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007. This encompasses the identification of strengths, weaknesses and challenges in various areas. The analysis should be carried out by consist-

ently referring to the ability to attain concrete results for poor women and men in Honduras, Nicaragua and Guatemala in an effective way.

Key questions to be addressed regarding objective a:

- What level of coherence of and potential for synergies do the country *programmes* developed by Forum Syd display? Are the programmes more than the sum of a number of projects, and if then, how?
- What is the value added of Forum Syd in the programmes? Apart from providing funding, which are the specific or unique qualities of Forum Syd in relation to its partner organisations and other international NGOs (such as thematic expertise, lobbying, financial systems, planning processes, methodology).
- What is the current level of Forum Syd's institutional capacity (primarily organisation and vision)? One aspect seen as important to analyse would be the capacity and distribution of responsibilities and roles between the head office in Stockholm, the regional office for Central America, and the national offices. Another aspect to include is Forum Syd as a learning organisation, i.e. its making use of earlier experiences (globally and in Central America).

- b) Within the context of the country concentration of Swedish bilateral development cooperation in Central America and the changing of RELA's support system to Swedish NGOs, provide a mapping and analysis of future scenarios regarding Forum Syd's programmes in the region. The mapping and analysis should pay special attention to potential consequences for partner organisations and target groups, especially in terms of sustainability and results of processes in which they participate.

Key questions to be addressed regarding objective b:

- Embarking from an assumption of a phasing-out period of one year (2008), what are the most important challenges and possibilities for Forum Syd, its partner organisations and their target groups for each one of them? The consultants should use the elaboration of Swedish phasing-out strategies for Nicaragua and Honduras, and the strategy process (or preparatory discussions) for Guatemala, as a point of reference.
- How would a termination of RELA support affect Forum Syd's partner organisations and their target groups, especially in relation to the processes that they initiate and participate in (i.e. consequence analysis)? Differences (in a general sense) between and within country programmes should preferably be identified.

Another question that should be contemplated is:

- What are the most important lessons to be learned from the experience 2004–2007? Factors that should be taken into account are the preparatory phase (definition and construction of the programmes), Forum Syd's role as a Northern NGO vis-à-vis local counterparts, and Sida's (RELA and Embassies) capacity to secure a qualitative follow-up of the programme.

The final report shall include a chapter with recommendations to Forum Syd and also to Sida-RELA as regards the future. The recommendations to Forum Syd should include possible ways of developing the organisation's work, including programme development, finding new financial resources and roles, and supporting partner organisations in a phasing-out scenario. The recommendations to RELA and the Embassies shall include considerations regarding Forum Syd's programmes in relation to pending exit strategies of the bilateral development cooperation with Honduras and Nicaragua.

3. The Assignment

The study should be carried out during a period amounting to maximum two months. A suggested period would be mid-November 2007 until January 2008. First, this implies that Forum Syd will have advanced substantially in the implementation of its “transition phase” and also advanced in discussions with RELA regarding the framework for a possible phasing-out support. Second, it is likely that the framework for Swedish exit strategies will have become increasingly clear during this period.

As regards methodology, the analysis team shall propose their overall approach in their quote. However, the study shall encompass both analysis of existing documentation and interviews with representatives from various stakeholders (see Appendix 1). Another requirement is that the final report be discussed with stakeholders in a participatory way (see Chapter 3.2).

The consulting team will be responsible for arranging travel and hotels. Regarding organising meetings with interviewees in Guatemala, Honduras and Nicaragua, it is expected that Forum Syd will facilitate this.

3.1 The consulting team

It is suggested that the team consist two consultants with profiles that complement each other. Preferably, one of the consultants should be team leader and have a thorough knowledge of Swedish development cooperation in Central America, whereas the other consultant should be sub-contracted and have a thorough knowledge of civil society organisations in Central America.

3.1.1 *Qualifications Required by the Consultants*

Team leader

- Extensive experience from Swedish development cooperation in Central America
- Thorough knowledge of political developments in Central America
- Knowledge of civil society/ popular movements in Central America
- Previous participation in studies, analyses and/or evaluations of development programmes with focus on democracy
- General knowledge of Swedish NGOs/Swedish popular movements engaged in development cooperation
- Experience from work with development cooperation on democracy, human rights or related issues
- Knowledge of ongoing/pending processes in Swedish development cooperation such as country concentration and elaboration of regional and/or country cooperation strategies
- Experience from work with organisational development
- Excellent writing and communication skills in Spanish, English and Swedish

Sub-contracted consultant

- Extensive experience from international development cooperation in Central America
- Thorough knowledge of organised civil society in Central America, preferably with a voluntary or professional background in a CSO.
- Experience from work with organisational and programme development
- Thematic expertise in democracy, human rights, international trade and/or gender issues
- Excellent writing and communication skills in Spanish and good writing and communication skills in English

3.2 Suggested framework for activities

The candidates for the assignment should propose a detailed schedule of activities and dates in their quote. However, below a proposal for possible activities (in chronological order) and the time distributed among them is presented.

Team leader

Preparations (reading, planning interviews etc)	3 days
Interviews Sweden	3 days
Interviews Central America	7 days
Travel/ Reading (trans-Atlantic, internal CA)	4 days
Draft report	3 days
Final report	2 days
Seminar Sthlm on findings FS/RELA (incl. preparations)	1 day
Total	23 days

Local sub-contracted consultant

Preparations (reading, planning interviews etc):	3 days
Travel days GUA-NIC-HON (interviews and feedback)	3 days
Interviews Central America	7 days
Inputs draft report	2 days
Inputs/comments final report	1 day
Meetings for feedback Central America (FS and Embassies)	2 days
Total:	18 days

3.3 Budget

The preliminary budget for the external analysis is 315 000 SEK. This amount has been defined in a context of very limited financial space on the appropriation for development cooperation in Latin America for 2007.

4. Quote and reporting

Quotes from candidate consultants should provide a clear account for methodology applied, time-schedule (including tentative work schedule), a proposed budget and the CVs of the proposed team.

The report shall be written in the English language and include an executive summary of maximum two pages. The report shall be no longer than 40 pages (12 pt).

The team shall submit an inception report of maximum three pages at the latest two weeks after the evaluation has been started. The inception report shall include a brief account of the planned field visit (interviews), if necessary identified problems and solutions to them (e.g. regarding documentation and methodology), and also a tentative proposal for the disposition of the final report.

Quote for consultancy services:

“External Analysis of Forum Syd’s Country Programmes in Central America (Honduras, Nicaragua and Guatemala) during January 2004–October 2007”

1. The Services

1.1 Background

In 2004, within the framework of RELA’s guidelines for support to Swedish NGOs it was decided to support Forum Syd’s democracy and regional influence programmes in Central America 2004–2006 with a total amount of 21.3 MSEK. In December 2006, RELA rejected an application from Forum Syd for a two-year support to three country programmes (Honduras, Nicaragua and Guatemala). In February 2007, on the basis of a new application from Forum Syd, RELA decided to extend the support to Forum Syd with one year and provide additional funds totalling approximately 8 MSEK.

RELA’s plans to carry out an external analysis of Forum Syd’s programmes in Central America was communicated to Forum Syd during the autumn of 2006. Originally, the analysis was planned to be made during June–August 2007, but as it became clear that the conditions for Swedish development cooperation in Latin America soon were to change substantially – with the coming of the governmental decision on geographic concentration and the subsequent phasing out of development cooperation with certain countries – RELA decided to slightly postpone the study.

Another factor which directly will affect prospects for future RELA funding for Forum Syd is that during 2007 RELA has initiated a revision of the system for support to Swedish NGOs which was introduced in 2003. During the spring of 2007, RELA therefore informed Swedish NGOs that it would not elaborate instructions for applications from Swedish NGOs for 2008, and some months later RELA hosted a seminar on civil society in Latin America to which Swedish NGOs were invited. The ambition is to maintain an open dialogue on future support models with stakeholders and the final result of this process is still open-ended, partly because it has to be related to the still pending strategy processes.

1.2 Main objectives

The study has two main objectives:

- c) To analyse and assess developments within the process of change initiated by Forum Syd during 2007, as set out in the application to RELA for 2007. This encompasses the identification of strengths, weaknesses and challenges in various areas. The analysis should be carried out by consistently referring to the ability to attain concrete results for poor women and men in Honduras, Nicaragua and Guatemala in an effective way, and;
- d) Within the context of the country concentration of Swedish bilateral development cooperation in Central America and the changing of RELA’s support system to Swedish NGOs, provide a mapping and analysis of future scenarios regarding Forum Syd’s programmes in the region. The mapping and analysis should pay special attention to potential consequences for partner organisations and target groups, especially in terms of sustainability and results of processes in which they participate.

1.3 Understanding of the Terms of Reference

The ToR make it evident that this assessment is not a conventional one, as it is being carried out against the backdrop of:

- (i) radical changes in the overriding conditions of Swedish development cooperation with substantial implications for future funding in Central America; and

(ii) major shifts in Forum Syd's own programs in relation to their 2004–2006 structure, with 2007, a complex “transition” year, constituting a central focus in this study.

Moreover, it emphasizes analysis of recently initiated organizational and institutional processes rather than addressing to what extent certain pre-defined “hard” indicators have been met with or achieved. Instead of focussing on past results, this assignment aims to generate findings and propose recommendations that are useful in a highly dynamic situation, with inputs for perspectives on the future.

The main inputs needed for perspectives on the future will focus on:

- the results so far of efforts to address deficiencies and weaknesses earlier identified in Forum Syd's programs (as agreed between RELA and FS);
- Forum Syd's current capacity levels (organizational strengths and strategic vision);
- mapping and analysis of future scenarios under alternative circumstances, exit strategies vs. continued funding, with a view to the impact on partner organizations and members of the target group (poor men, women and children).

In this context it is important to keep in mind the overarching objective of the expected recommendations for change, i.e. their purpose to enhance Forum Syd's *ability to attain concrete results for poor women and men in Honduras, Nicaragua and Guatemala in an effective way*. Even if not explicitly mentioned in the ToR, this objective in our opinion requires that efforts be dedicated also to an analysis (through documents and interviews) of at least some representative projects and their reported results.

At the same time, there are two other tasks which do get explicit mentioning in the ToR but which, in our view, should not be addressed by this assessment for reasons of time constraint. We here refer, firstly, to the proposed analysis of the value added (specific and unique qualities) of Forum Syd in relation not only to its partner organizations (which of course is a an important task) but also as compared to “other international NGOs (such as thematic expertise, lobbying, financial systems, planning processes, methodology)”.⁵⁷ Whereas some references to other international NGOs may be within reach of this analysis, complying with the task as stated above would both require more time and a separate input study analysing a selected group of international NGOs. The second task mentioned in the ToR and which in our opinion also would require considerably more time and/or a special input study, concerns the wish to get recommendations on how Forum Syd could find “new financial resources”.⁵⁸

1.4 Expected products

The assignment will generate two main products. Firstly, briefings and discussions with staff from Sida and Forum Syd on the main findings, in Central America as well as in Stockholm. And, secondly, a written Mission Report including the following dimensions:

- *a brief background analysis* which will situate the assessment both in the context of contemporary Central American development challenges as well as in relation to Swedish development policies (including the policy changes now underway/to be implemented);
- *a comprehensive analysis and assessment* of Forum Syd's progress in instituting the process of change initiated at the beginning of this year;
- *mapping of alternative scenarios*: An exploration of different future alternatives for Forum Syd, ranging from continued Sida-RELA support to the need to acquire other funding, phase out partnerships and including assessments of potential impact both on local CSO as well as target populations;

⁵⁷ ToR, section 2.1, under paragraph (a).

⁵⁸ ToR, section 2.1, final paragraph.

- recommendations to Forum Syd and Sida with specific reference to programme strengthening and development, as well as institutional options.

Briefings and discussions on preliminary findings and conclusions will be held with the Swedish Embassy and Forum Syd in Managua when the field trip has been completed and before the consultants start elaboration of the Mission Report. The Draft Mission Report will be presented for feedback from Sida and Forum Syd, both in the Region (i.a. in Nicaragua⁵⁹) and in Stockholm. The Final Report will be presented at a seminar in Stockholm during the last week of January.

1.5 The team

The services will be delivered by the company Svart på Vitt HB, and performed by Mr Pierre Fröhling (team leader) and Ms Francesca Jessup. Ms Jessup is an international consultant residing in Central America and represents solid expertise on the themes addressed by this assignment. The CVs of both professionals are enclosed to this quote.

2. Considerations regarding the implementation of the consultancy

2.1 Structuring and methodology

The assignment will be carried out in three phases. Firstly, a preparatory phase which contains a desk study/analysis of principal background documents (as indicated by the ToR as well as other documents of high relevance), the definition of interviews to be undertaken in Stockholm as well as in Central America, the elaboration of a basic structure for the interviews and, finally, the conduction of selected interviews in Sweden (Sida, Forum Syd, other CSOs). This first phase terminates with the elaboration of an *inception report* to Sida, on how to proceed with the coming steps.

Secondly, a field phase in Central America, involving interviews with key staff at Forum Syd, the Swedish Embassies, partner organizations, international institutions and NGOs and relevant informed observers. This phase ends with the presentation of tentative main findings to Embassy and Forum Syd staff in the region.

Thirdly, the final analysis and report writing phase, which includes (a) the elaboration and presentation of a draft report, in Stockholm as well as in Central America in order to receive feedback; (b) the elaboration of a Final Mission Report, and; (c) the participation in a seminar in Stockholm where the Final Report is presented and discussed.

Regarding the methodology, as previously noted, the central thrust of this external analysis is on examining Forum Syd's implementation of the recommendations to address specific weaknesses and deficiencies which have emerged from analysis to date (see Section 1.4), as well as to generate a mapping of alternative future scenarios, given the special new circumstances related to Swedish development cooperation and to support modalities for Swedish NGOs. Consequently, the assessment will not employ traditional evaluation criteria which focuses predominantly on the outcome and performance of the projects themselves, but will rather place the weight of the analysis on Forum Syd's progress in instituting a crucial process of change.

The preparatory desk phase and interviews in Stockholm with key actors should provide the initial inputs regarding the history of the programme; elements that went into the definition and construction of the programmes, as well as the strategic and policy perspectives from Forum Syd, Sida and other CSOs at the headquarters level regarding the changes underway and future scenarios.

⁵⁹ Where FS has its regional office and where contacts with the Embassy is and generally has been close, including FS carrying out a special program (on gender) for the Embassy/Sida.

The interviews with Forum Syd will explore progress in implementing changes in the overall organizational and institutional set-up for program management and implementation; in reporting, monitoring and evaluation, with respect to results on the ground; “learning curve” capacity, integration of lessons learned; programme capacity for the new three-country structure, and the strategic vision towards the future. Interviews should examine Forum Syd’s analysis of the coherence and potential synergies of the country programmes and potential consequences for partner organisations and target groups of alternative future scenarios.

Interviews with local CSOs and target groups should focus on generating key information regarding their view of the challenges, achievements and limitations facing these partnerships from an organizational and strategic perspective during the period being analyzed, and their perspectives on lessons learned. An important query to CSOs relates to one of the key criteria used by Sida in its support for Swedish NGOs – that their support for local CSOs must develop *human resources and organization as well as support and develop the knowledge, understanding and skills of the partner organisation to take over the activity*. CSO analysis should be sought regarding the potential consequences for such partner organisations and target groups of any phasing out-strategy, especially in terms of sustainability and results of processes in which they participate.

With respect to the target groups, the consultants will seek to analyze a reduced amount (3–5 per country) of representative projects concerning certain standard performance criteria such as efficiency, effectiveness, outcome, sustainability, timeliness, and coordination with other actors.

Field interviews with Sida staff should explore their view of the most important lessons learned during the period under study, as well as on developments within the process of change initiated by Forum Syd during 2007. It should explore their perspectives on the coherence and potential synergies of the new country programme structure, their vision of the consequences for partner organisations and target groups with alternative future scenarios, and their own capacity to insure a qualitative follow-up of to programme.

Finally, concerning the composition of the list of persons to be interviewed, the consultants will seek to somewhat widen the circle and – in spite of the obvious time constraints – also include persons knowledgeable about Forum Syd and/or partner organizations without having a direct relationship to them.

Annex 2 Assignment and Mission Itinerary

Monday, November 19th:

- Series of background interviews in Stockholm initiated
- Preparations for the field visit are intensified (mainly undertaken from Managua)

Sunday, December 2nd

- Field visit starts with internal team work in Managua

Monday, Dec 3rd

- Interviews in Managua

Tuesday, December 4th

- Interviews in Managua, visit to Estelí

Wednesday, december 5th

- Visit to Nindirí, interviews in Managua

Thursday, Dec 6th

- Morning flight to Tegucigalpa, interviews in the city
- Travel to Comayagua, evening interviews

Friday, Dec 7th

- Visit to Marcala, interviews in Comayagua

Saturday, Dec 8th

- Visit to Las Lajas, travel to Tegucigalpa, evening flight to Guatemala City

Sunday, Dec 9th

- Summarizing of impressions, half day off

Monday, Dec 10th

- Interviews in Guatemala City, travel to Quetzaltenango, evening interviews

Tuesday, Dec 11th

- Visit to Huitán (Quetzaltenango) and to San Pedro (San Marcos); returning to Xela

Wednesday, Dec 12th

- Travel to Guatemala City, evening flight to Managua

Thursday, Dec 13th

- Last interviews in Managua, preparations for the debriefing

Friday, Dec 14th

- Debriefing at the Embassy in Managua; elaboration of the principal structure of the Draft Report

Tuesday, Dec 18th

- Last interviews conducted in Stockholm

Wednesday, Jan 2nd

- Writing of complete version of the Mission Draft Report initiated

Annex 3 List of persons interviewed/met with

A. Sida staff

Mr. Hans Magnusson, Head of RELA, Sida-Stockholm

Mr. Mattias Jonsjö, RELA, Sida-S

Mr. Göran Paulsson, RELA, Sida-S

Ms. Sara Martínez Bergström, Sida-Bolivia (by phone)

Ms. Karin Zetterlund Brune, SEKA, Sida-S

Mr. Tomas Brundin, SEKA, Sida-S

Ms. Susanna Janson Landin, Sida-Nicaragua

Mr. Carlos Rivas, Sida-Honduras

Ms. Juana Maria Camposeco, Sida-Guatemala

Ms. Teresa Rovira, Sida-Guatemala

B. Forum Syd staff (former and current)

Ms. Inger Björk, Secretary General, FS HQ

Mr. Andreas Dolk, Head of Planning, HQ

Mr. Rodrigo Arce, Latin America Desk, HQ

Mr. Tomas Rydmo, former FS Director in Central America

Ms. Sara Haglund, former Program Director in Nicaragua

Mr. Lars Bildt, former Director in Central America

Mr. Magnus Björk, current Regional Director (Regional Office in Nicaragua)

Ms. Magda Brättemark, Country Coordinator Nicaragua (Office in Nicaragua)

Ms. Karin Nilsson

Ms. Johanna Stenersen

Ms. Lola Castillo

Ms. Jesenia Guevera

Mr. Fernando Jambrina

Ms. Chachi Bildt

Ms. Linda Björk

Mr. Eric Vásquez, Country Coordinator Honduras (Office in Honduras)

Mr. Cristian Suazo

Mr. Freek Ruijs

Ms. Susanne Kurtson, Country Coordinator Guatemala (Office in Guatemala)

Mr. Martín Vásquez

C. Counterpart representatives and members

Nicaragua:

COMUNIP, Estelí

Oyanka, Estelí

School of Political Incidence, Estelí (outside the town, at the school)

Nakawé, Nindirí

Coordinadora Civil, Managua

Nicaraguan Network for Local Development (RNDDL), Managua

Punto de Encuentros

Honduras:

CHAAC, Tegucigalpa

FOSDEH, Tegucigalpa

FIAN, Tegucigalpa

Interforos La Paz, Marcala

La COL, Las Lajas

Las Hormigas, Comayagua

Asociación Limitados Físicos, Comayagua

Guatemala:

COMAM, Huitán (Quetzaltenango)

(Consortium of three organizations for citizen participation)

ADIMA-Aj'chmol, San Pedro (San Marcos)

(Civil society organization working in coordination with other groups around political incidence on a variety of issues)

D. Others

Diakonia (Managua, NIC)

Svalorna (Estelí, NIC)

Embassy of the Netherlands (Managua, NIC)

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RELA *Guidelines for support to Swedish NGOs from the appropriation to Latin America 2004 and 2007*

2007. RELA. *Initial assessment of Forum Syd's application to RELA for extension of support during 2007–2008 for programmes in Honduras, Nicaragua and Guatemala*

2007. RELA's assessment and decision related to Forum Syd's additional applications for support during 2007 for the programmes in Honduras, Nicaragua and Guatemala

2007. Sida Decision 2007–2017 “*Prolongation and additional support to Forum Syd's programmes in Nicaragua, Honduras and Guatemala*” and related assessment memo.

2007. *Amendment to the Specific Agreement Sida and Forum Syd on the Central America Program (2007)*

B. Other Sida documents

2002. Sida. *Swedish/UNDP Governance Programme in Honduras.* Sida Evaluation Series 02/05.

2005. Sida. *Partnership Evaluation of Forum Syd.* Sida Evaluation 05/16. Department for Cooperation with Non-Governmental Organisations, Humanitarian Assistance, and Conflict Management.

2007. Sida. Policy: *Sida's Support to Civil Society in Development Cooperation.*

II. Forum Syd documents:

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2003. Forum Syd. Application to RELA for Support to their Democracy and Influence Programmes in Central America 2004–2006

Protocols from annual meetings between RELA and Forum Syd 2005, 2006 and 2007

2004, 2005. Forum Syd. *Annual Narrative and Financial Reports.*

2004, 2005, 2006. Forum Syd. *Final Narrative and Financial Reports.*

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2007. Forum Syd's application to RELA for extension of support for 2007–2008 for programmes in Honduras, Nicaragua and Guatemala

2007. Forum Syd's additional application to RELA for extension of support during 2007 for programmes in Honduras, Nicaragua and Guatemala.
2007. Forum Syd. Official documentation on the country concentration process.
2007. Forum Syd. Input Study (for the discussion on staff policies and team functioning within Forum Syd in Central America) by Cecilia Medal Salaverry.
2007. Forum Syd. *POAs for National Programs for 2007*
2007. Forum Syd. *Action Plan* (for organizational improvements etc, elaborated after a workshop in Managua in Feb 2007)

III. External evaluations and other documents:

2006. *External Evaluation of Forum Syd's Gender Equality Programme in Nicaragua 2004–2006* by Carolina Wennerholm (Kvinnoforum) and Fátima Real R (Fundación Mejía Godoy)
2006. Bergeå, Jon. *Final Report* (personal report after having served FS in Nicaragua during the period Nov 2003–May 2006).
2007. *External Evaluation of the Program for Local Democracy in Nicaragua*, by Carlos A. Riba (coordinator), Julio Mendoza and Jairo Ramírez.
2007. Bildt, Lars. *The Accidental Director* (personal report after having served FS on different posts in Central America during the period 2003-06-01 to 2007-05-31).

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